Oracle Applications Cloud
Using Common Features

This guide also applies to on-premise implementations

Release 8

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.

Note

If you don't see any help icons on your page, then click the Show Help icon button in the global area. However, not all pages have help icons.

You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. To access the guides, go to any page in Oracle Fusion Applications Help and select Documentation Library from the Navigator menu.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.

- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.

- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief
financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Intended Audience</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common User Guide</td>
<td>All users</td>
<td>Explains tasks performed by most users.</td>
</tr>
<tr>
<td>Common Implementation Guide</td>
<td>Implementors</td>
<td>Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.</td>
</tr>
<tr>
<td>Functional Setup Manager User Guide</td>
<td>Implementors</td>
<td>Explains how to use Oracle Fusion Functional Setup Manager to plan, manage, and track your implementation projects, migrate setup data, and validate implementations.</td>
</tr>
<tr>
<td>Technical Guides</td>
<td>System administrators, application developers, and technical members of implementation teams</td>
<td>Explain how to install, patch, administer, and customize Oracle Fusion Applications.</td>
</tr>
</tbody>
</table>

**Note**
Limited content applicable to Oracle Cloud implementations.


### Other Information Sources

**My Oracle Support**


Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.
Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides details on service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes.

In Oracle Fusion Applications, you can use Oracle Enterprise Repository at http://fusionappsoer.oracle.com for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.

- Other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use Send Feedback to Oracle from the Settings and Actions menu in Oracle Fusion Applications Help.
Using Oracle Fusion Applications: Overview

Oracle Fusion Applications is a complete set of applications for performing business tasks across your enterprise. These applications are based on business process models. Many of the common features and functionality are available to all users, while others are available in select pages or flows.

Navigation

After you sign in, you land in the home page of Oracle Fusion Applications, which includes the Welcome dashboard and other dashboards relevant to your roles. Use these dashboards and the global area, specifically the icon buttons including Navigator, as starting points for navigation. One navigation feature is the Watchlist, which provides a set of shortcuts to items that you want to track or that require your attention.

Search

Searches are available throughout the applications and help you find the business objects that you want to view or manage. While most searches are specific to one business objects, the search in the global area lets you search in a broader scope.

Data Management

Aside from creating, editing, and otherwise managing business objects in the application pages, you can also work in a spreadsheet where available. You create or edit records in a Microsoft Excel file and upload the records back into Oracle Fusion Applications.

Other data management features include attachments, which provide supplementary information for business object records, for example receipts attached to expense reports.

Also available is audit history, which lets you view details regarding when business objects were created, updated, and deleted, who performed the actions, which attributes were impacted, and more.
Notifications and Approvals

You receive notifications as part of workflows when there is a task that requires your attention or action, for example an expense report pending your approval.

Collaboration Features

Collaboration features are tools, for example tags and discussions, that let you coordinate your activities and share information with others.

Scheduled Processes

Use scheduled processes to manipulate batches of data, and in some cases generate output, for example statutory reports.

Business Intelligence

Use business intelligence to access information in a way that meets business needs or aids in decision-making. You can review business intelligence analyses and dashboards, as well as create or edit them, depending on your roles.

Personalization

Personalization involves changes you make to the page that apply only to you, for example hiding specific sections or table columns, or adding regions to a dashboard. You can also use preferences to personalize the application for yourself, for example by setting language preferences. In the global area, go to Settings and Actions - Personalization to personalize pages or set preferences.

Help and Troubleshooting

Aside from the help that you see embedded in the application, for example hint text, you can also use Oracle Fusion Applications Help to find the information that you need regarding what you are working on. You can access Oracle Fusion Applications Help through help windows or Settings and Actions - Applications Help in the global area.

When you encounter an issue that you cannot resolve by consulting Oracle Fusion Applications Help, there are diagnostic tests and other troubleshooting features available to you or your help desk. You can access some of these features from Settings and Actions - Troubleshooting in the global area.

Accessibility

Oracle Fusion Applications provides comparable access to persons with disabilities, with features such as keyboard-only support, the ability to alter font sizes and screen colors, and interoperability with assistive technology such as screen readers. You can enable some of these features by setting accessibility preferences, which you access from the Accessibility icon button in the global area or from preferences.

Business Process Management: Explained

Business Process Management (BPM) enables organizations to either optimize their business processes or adapt them to new organizational needs. Business
process modeling is one important element of BPM. Oracle Fusion Applications is based on business process models that are presented in a five-level hierarchy, which illustrates the process from a high-level, conceptual view to a low-level, application specific view.


**Business Process Modeling Levels**

The levels of the business process modeling hierarchy are: industry (L0), business process area (L1), business process (L2), activity (L3), and tasks (L4). L1 through L3 are business-driven and independent of any specific implementation in an application, while L4 is influenced by Oracle Fusion Applications products and functionality. For example, the model includes Financial Control and Reporting as an L1, Close Accounting Period as an L2, and Close Ledger as an L3. Under the Close Ledger activity, there are L4 tasks such as Manage Accounting Periods and Create Balance Sheet Closing Journals, which align with functionality available from Oracle Fusion Applications.

**BPM in Oracle Fusion Applications**

Oracle Fusion Applications is organized around these hierarchy levels and flows, which puts focus on the activities and tasks that you need to perform. The navigation, user interface, parts of security, and other aspects of the application are all influenced by, if not directly based on, the business process modeling levels. For example, in Oracle Fusion Applications Help, the hierarchy in the Business Processes navigator corresponds to L1 through L3. Each help file is assigned to at least one L3 activity. The primary activity, along with the corresponding business process area and business process, is displayed as breadcrumbs for a help file when you see it in search results or view the file content.
Watchlist

Adding, Displaying, and Renaming Watchlist Items: Points to Consider

Though the Watchlist comes with predefined categories and items, you can add or remove custom items to and from your own watchlist, determine which predefined and custom items are displayed or hidden, and rename your custom items.

**Adding or Removing Items**

To add a Watchlist item to your own watchlist, create an appropriate saved search on a search page with the Manage Watchlist button or menu item enabled. For example, if you want your watchlist to track corporate card transactions that arrived in the last week, then create a saved search for corporate card transactions with the appropriate search criteria. Use the button or menu item to open the Manage Watchlist dialog box, and select the saved search that you created.

You can include any saved search that you created on this search page as a Watchlist item, and it would be available to be displayed in your own watchlist only. All saved searches from the same search page appear in the Watchlist under one predefined Watchlist category.

To remove a Watchlist item based on a saved search, you can deselect it in the Manage Watchlist dialog box. If you delete the saved search itself, then immediately after doing so you should also deselect it from the Manage Watchlist dialog box. Otherwise, the deleted saved search will still appear in the dialog box, and the corresponding Watchlist item as well in your watchlist, until the next refresh of that Watchlist item. The refresh might be hours later, depending on setup.

**Displaying or Hiding Items**

Your Watchlist preferences contain all the predefined categories and items available to you, as well as any saved searches that you selected to use in the
Watchlist. From this list, you can specify which categories and items to display in your own watchlist. To access your Watchlist preferences, go to the global area and then Settings and Actions - Set Preferences - Watchlist.

From the subset you selected to display, you can also choose to hide items that have no results found. Whenever the Watchlist refreshes, if there are no records that meet the criteria of the Watchlist item, then that item is not displayed in your watchlist.

**Renaming Items**

You cannot rename predefined Watchlist items or items based on your saved searches. You can ask your administrator to edit predefined Watchlist item names, but the changes will apply to all users.

For Watchlist items based on your saved searches, the saved search name is displayed as the Watchlist item name. You can rename the saved search using the Personalize Saved Searches dialog box from the corresponding search page. The Watchlist item name is then automatically updated the next time that the Watchlist is refreshed.

**FAQs for Watchlist**

**What's the difference between the Watchlist and the Worklist?**

The Watchlist feature provides a set of shortcuts to items that you want to track or that require your attention. Use the Watchlist to see a count for each item and to navigate to the relevant work area where you can view or perform tasks on the item. For example, a Watchlist item is for expense reports awaiting submission. You can see how many expense reports you have created but not yet submitted, and click the Watchlist item link to navigate to the work area where these reports appear.

The Worklist feature presents workflow tasks that require your approval or other action, as well as notifications for you to view. Use the Worklist to manage your tasks, access their details, or take appropriate action. For example, some managers might see approval tasks for invoices, and select a particular task to approve, reject, or otherwise act on the corresponding invoice.

**Note**

In some cases, you can use either the Watchlist or Worklist to perform the same task. For example, managers can also use the Watchlist item for invoices requiring their approval to see all such invoices and then select the one to act on.

**Why are some items not displayed in my watchlist?**

Your Watchlist preferences determine what actually appears in your watchlist. You may have set your preferences to hide specific items or all items with no
results found. If all items within a category are hidden due to what you set in preferences, then the category would also be hidden. To review your preferences, go to the global area and then Settings and Actions - Set Preferences - Watchlist.

When you select a saved search to be included as a Watchlist item in the Manage Watchlist dialog box, you determine that the item is available for the Watchlist, not that it is necessarily displayed. So even though your saved search is included in the Watchlist, it could be hidden due to your Watchlist preferences.

It is also possible that:

- You deselected saved searches in the Manage Watchlist dialog box, or deleted the saved searches.
- Your administrator has disabled specific predefined Watchlist items or categories for all users.
- You administrator has disabled using saved searches from specific search pages as Watchlist items.
- You no longer have access to tasks or pages that were previously available to you.

In these cases, you can no longer see the corresponding Watchlist items in your watchlist or in your Watchlist preferences.

**Why is the last refreshed time of the Watchlist region different from that of individual Watchlist items?**

The last refresh time for the entire Watchlist is displayed at the top of the Watchlist region. Each Watchlist item, however, is defined with a refresh interval, which your administrator sets. When you refresh the Watchlist, the count is refreshed for an item only if the time since the last refresh of that item is greater than the defined refresh interval.

For example, a Watchlist item with a refresh interval of ten minutes was last refreshed at 1:00. If you refresh the Watchlist at 1:07, the last refreshed time for the item remains at 1:00 because it has not been ten minutes since its last refresh. Your refresh, however, may have updated the count for other items, and 1:07 is displayed as the last refreshed time for the entire Watchlist region.

**Why is the count different between a Watchlist item and the page that the item link takes me to?**

Watchlist item counts are refreshed periodically for optimized application performance. Relevant records could have been created, edited, or deleted since the last time the Watchlist item count was refreshed.
What's the difference between the various searches on the page?

The search in the global area is always available to you and lets you search for various objects in all categories that are relevant to you and your roles. Use this search to quickly find something based on keywords, especially if you are searching across different objects and do not have more specific criteria. The global area search is based on Oracle Fusion Applications Search.

Searches in the regional area or local area, where available, let you search for specific objects. Use the regional area search to quickly search based on one or few criteria, but use the local area searches to enter more specific search criteria.

Note
Running a search in the regional area refreshes the local area and clears Query By Example values, if any.

FAQs for Oracle Fusion Applications Search

Why is Oracle Fusion Applications Search not providing real-time search results?

Results from Oracle Fusion Applications Search are not real-time, but based on indexes that are refreshed with a frequency that your administrator determines. Until indexes are refreshed, newly created records may not be searchable, deleted records may still appear, and attribute values may be outdated.

It is possible that the object you are searching for is not included in Oracle Fusion Applications Search. If applicable, use the search in the local area if you know which work area to go to, and especially if you want to see the latest information in the search results.

Finally, make sure that you are correctly using wildcards, operators, and so on when you enter keywords.
How can I save a search in the global area?

Run the search that you want to save in the global area, and save the search from the Oracle Fusion Applications Search dialog box. You are not saving the search results themselves, but the keywords and any categories or filters applied to the search results at the time you create the saved search. When you later use this saved search, you are likely to get different search results because records could have been added, edited, or deleted in the meantime.

How can I edit and delete saved searches in the global area?

In the global area, click the Search icon button and then Edit to rename or delete saved searches. To update search criteria, run the existing saved search, update keywords, categories, or filters in the Oracle Fusion Applications Search dialog box, run the search with the updated values, and save the search using the same name to overwrite the existing saved search.

Search in Local and Regional Areas

Search Rules: Examples

There are various rules that apply to search, for example wildcards that you can use. These rules apply to regular searches, for example the ones you see in pages in the local area, and not to searches based on Oracle Fusion Applications Search, for example the search in the global area. The following scenarios provide examples of search criteria entered according to search rules and the results of the search.

Search Rules
Aside from Oracle Fusion Applications Search, there are various search technologies in Oracle Fusion Applications. Not all the rules apply to all types of searches, and in some cases the search rule might be disabled for performance or other reasons. In most cases, the search fields are not case sensitive.

This table describes each search rule, what you enter as search criterion to use the rule, and an example of how the rule is used. The Description and Example of Results columns can present more than one possible behavior, to reflect how different search technologies work.

<table>
<thead>
<tr>
<th>Search Rule</th>
<th>What You Enter</th>
<th>Description</th>
<th>Example of Search Criterion</th>
<th>Example of Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>One number</td>
<td>Results include the exact number as a whole. This equals operation is the default for search criteria with number values.</td>
<td>10</td>
<td>Records with the number 10, but not 100 or 210.</td>
</tr>
<tr>
<td>Date</td>
<td>One date</td>
<td>Results include the exact date. This <strong>equals</strong> operation is the default for search criteria with date values.</td>
<td>12-Oct-2012</td>
<td>Records with an October 12, 2012 date.</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
<td>------------------</td>
<td>---------------------------------------</td>
</tr>
</tbody>
</table>
| Single Word  | One word            | • Results include the word, or the word at the start of a larger word. This **starts with** operation is the default for search criteria with character values.  
• Results include the exact word. | report           | • Records with the word *report*, or words such as *reports* and *reporting*.  
• Records with the word *report*. |
| Phrase       | Multiple words, without quotation marks | • Results include the exact phrase, or the words as a part of a larger phrase.  
• Results include all of the exact words in any order. | expense report   | • Records with the exact phrase *expense report*, or phrases such as *expense reports* and *expense reporting*.  
• Records with both the words *expense* and *report*, for example *report on the expense*. |
<table>
<thead>
<tr>
<th>Wildcard (Multiple Characters)</th>
<th>% at the beginning (only in search fields that are not required or conditionally required), middle, or end of a word.</th>
<th>Results include words that replace the wildcard with zero or more characters. You can use the wildcard more than once in one word.</th>
<th>exp%</th>
<th>Records with the word exp or words beginning with exp, such as expense or expert.</th>
</tr>
</thead>
<tbody>
<tr>
<td>One of these conditions must be selected:</td>
<td>• Starts with</td>
<td>Precede % with a \ if you want to search for a term with the actual symbol. For example, to search for expense %, enter expense %.</td>
<td>exp%</td>
<td>exp_nse</td>
</tr>
<tr>
<td></td>
<td>• Ends with</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Contains</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Does not contain</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Caution</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Using this wildcard at the beginning of a word can impact performance.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Wildcard (Single Character)</th>
<th>_ at the beginning (only in search fields that are not required or conditionally required), middle, or end of a word.</th>
<th>Results include words that replace the wildcard with one character. You can use the wildcard more than once in one word.</th>
<th>exp_nse</th>
<th>Records with words such as expense or expanse.</th>
</tr>
</thead>
<tbody>
<tr>
<td>One of these conditions must be selected:</td>
<td>• Starts with</td>
<td>Precede _ with a \ if you want to search for a term with the actual symbol. For example, to search for expense_report, enter expense _report.</td>
<td>exp_nse</td>
<td>exp_nse</td>
</tr>
<tr>
<td></td>
<td>• Ends with</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Contains</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Does not contain</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note**
Depending on search technology, this wildcard does not match spaces or symbols that separate words. For example, expense_report does not match expense report or expense/report.
### Saved Searches: Explained

A saved search contains specific search criteria and settings that are captured for running the same search again later. You save the visible search fields and entered criteria, selected conditions, and search mode, either basic or advanced. You can choose to save search result display settings as well, for example the values entered in Query By Example fields, which columns to display or hide, the sort order, and column order. A saved search does not include the current set of search results or search result sort order. The values selected for filters in the search results table toolbar may or may not be included in the saved search.

**Note**

This type of saved search is created in the local area and is different from the one in the global area.

To edit a saved search, select **Personalize...** from the list of saved searches to open the Personalize Saved Searches dialog box. When you edit a predefined saved search, the changes are available only to you.

### Tasks

This table explains how to create, edit, and delete saved searches.

<table>
<thead>
<tr>
<th>Task</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Set the search criteria, run the search, and click the <strong>Save...</strong> button. You must run the search before saving it; otherwise, the saved search will be based on criteria for the last executed search.</td>
</tr>
<tr>
<td>Change the search criteria</td>
<td>Select the saved search, edit the criteria, and run the search. Create a new saved search with the updated criteria, and optionally delete the original saved search if it is not a predefined one.</td>
</tr>
</tbody>
</table>
Select Personalize... from the list of saved searches to open the Personalize Saved Searches dialog box. When you edit settings for a predefined saved search, the changes are available only to you.

**Settings**

When you create or edit a saved search, you define settings that affect what it includes and how it is used.

This table shows the available settings and what you determine if you select the option.

<table>
<thead>
<tr>
<th>Saved Search Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set as Default</td>
<td>The saved search is selected by default when you open the corresponding page, so the saved search criteria values are automatically set.</td>
</tr>
<tr>
<td></td>
<td>This is the only option available for predefined saved searches.</td>
</tr>
<tr>
<td>Run Automatically</td>
<td>A search runs as soon as the saved search is selected from the <strong>Saved Search</strong> field. If the Set as Default option is also selected, then the saved search runs as soon as you open the corresponding page.</td>
</tr>
<tr>
<td>Save Search Results</td>
<td>The saved search captures the size, order, text wrap state, hide state, and freeze state of all search result columns, as well as values entered in Query By Example fields. This option is only available when you create the saved search.</td>
</tr>
<tr>
<td>Show in Search List</td>
<td>The saved search is displayed in the <strong>Saved Search</strong> field. Hidden searches are still displayed in the Personalize Saved Searches dialog box. This option is only available when you edit the saved search.</td>
</tr>
</tbody>
</table>

**Availability and Usage**

A saved search can be limited to the page where you created the saved search, or in some cases available in other searches for the same object. You can determine which saved searches to use as items in the Watchlist, where available.

**Query By Example Operators and Wildcards: Explained**

You can use operators and wildcards within Query By Example fields for columns with character or number values. Do not use operators or wildcards for date fields.
### Operators

This table describes the operators that you can enter in a Query By Example field.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
</table>
| None (you enter only a value) | • Character fields - Starts with  
|                   | • Number or date fields - Equals                                               |
| >                 | Greater than                                                                |
| <                 | Less than                                                                   |
| >=                | Great than or equal to                                                      |
| <=                | Less than or equal to                                                       |
| and               | And                                                                         |

**Note**

You can use this operator only in conjunction with other operators, for example: >0 and <=1000.

<table>
<thead>
<tr>
<th>or</th>
<th>Or</th>
</tr>
</thead>
</table>

**Note**

- For alphanumeric fields, the >, <, >=, and <= operators provide results based on alphanumeric sort. For example, if you enter >=ABC, then ABC, ABD, ABCA, ACB, and BAC can be possible matches, but not AB5 or AB.
- For all operators other than and and or, a space is considered as part of the search value. For example, if you enter >= ABC, then ABC, ABD, and so on can be possible matches only if they are preceded with a space.

### Wildcards

This table describes the wildcards that you can enter in a Query By Example field. You can use them at the beginning, middle, or end of the entered value.

<table>
<thead>
<tr>
<th>Wildcard</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>Multiple characters</td>
</tr>
<tr>
<td>?</td>
<td>Single character</td>
</tr>
</tbody>
</table>

All other symbols are ignored.

### FAQs for Search in Local and Regional Areas

**How can I use Query By Example?**

Enter values by which to filter search results in the Query By Example fields, which are located immediately above table column headers for some searches.
in the local area, and press Enter. Results now consist of records that fulfill the criteria entered in all Query By Example fields. You can press Enter again to refresh the filter results, or, if available, select the **Search** icon from the table toolbar or **Refresh** from the **View** menu. The filter still applies even if the Query by Example fields are hidden. To remove the filter, clear all Query By Example fields or, if available, select **Clear** from the **View** menu.
Desktop Integration for Excel

Setting Up Oracle ADF Desktop Integration for Excel: Points to Consider

To use a desktop integrated Excel workbook to create or edit records that you can upload to Oracle Fusion Applications, you must fulfill software requirements, install a desktop client, and set up Microsoft Excel.

Software Requirements

You must have installed:

- Microsoft Excel 2007 or 2010
- Microsoft Windows XP Professional, Vista - Business, Vista - Ultimate, or 7

Desktop Client Installation

Install the Oracle ADF Desktop Integration Add-in for Excel, which is a desktop client that enables you to use the integrated workbooks that you download from Oracle Fusion Applications. If the client installer is not available under Navigator - Tools, then ask your administrator where you can find the installer.

Important

Make sure you are signed in to your computer with your account when you perform the installation. For example, you cannot have someone else sign in as an administrator and make the installation available for all users of your computer.

Depending on the setup of the client installer itself, you may get automatic updates when new versions of the client are available. If you do not get automatic updates, then you need to reinstall the client whenever the client version changes. You can find your client version in the About section of the workbook and ask your administrator if that version is the latest.
If the location of the client installer ever changes, then:

- You will not receive automatic updates.
- You must uninstall the client from your computer and use the installer from the new location.

**Note**

Any time you need to reinstall the client, you must first uninstall and then perform the install procedure again.

To uninstall, use the Add or Remove Programs dialog box from the Control Panel to remove the Oracle ADF Desktop Integration Add-in for Excel client.

**Microsoft Excel Setup**

Perform the following steps in Microsoft Excel only once, even if you reinstall the desktop client.

1. Click the **Microsoft Office** button, and click the **Excel Options** button.
2. In the Excel Options dialog box, select the Trust Center tab, and click **Trust Center Settings**.
3. In the Trust Center dialog box, select the Macro Settings tab, and select the **Trust access to the VBA project object model** check box.

**Note**

The exact steps can vary depending on your version of Microsoft Excel.

**Working in Desktop Integrated Excel Workbooks: Points to Consider**

Where available, you can download a desktop integrated Microsoft Excel workbook in which you can create or edit records. While you work in the integrated workbook, no changes are actually made in Oracle Fusion Applications; your edits take effect only after you upload the records back. As you work, keep in mind conventions and statuses used in the file, requirements for search, possible need to refresh, and things you should not do.

**Conventions**

Some column headers in the integrated workbook might include [..]. This means that you can double-click or right-click within any cell in the column to open a dialog box that lets you select a value to insert into the cell.

**Statuses**

The worksheet status in the header area applies to the entire worksheet, or tab, within the integrated workbook. Likewise, the table status applies to only the corresponding table. The row status applies to the state of the row within the workbook, not to the record itself. For example, if the row is an expense item, the
status does not mean the status of the expense item itself, but of the data in the row, in the context of the workbook.

**Search**

Some integrated workbooks have search functionality. For the search to work within the workbook, you must sign on to Oracle Fusion Applications.

**Refresh**

After you upload to Oracle Fusion Applications, you might need to refresh the data in the table if your changes are not reflected. You can use the refresh option for the table, or perform a filter or search on the table.

**What You Should Not Do**

To make sure that the upload to Oracle Fusion Applications goes smoothly, do not:

- Rename text from the integrated workbook, for example the worksheet or tab names.
- Use your own styles in the file.
- Add columns.
- Delete any part of the template, for example columns.
- Hide required columns and status columns or headers.

**Oracle ADF Desktop Integration for Excel: Troubleshooting**

The integration of Oracle Fusion Applications with Microsoft Excel allows you to download a desktop integrated workbook, create or edit records in the workbook, and upload the records to Oracle Fusion Applications.

**Issue**

The integration is not working. For example, you get an error when you try to open the workbook that you downloaded from Oracle Fusion Applications, or the workbook is not rendering properly.

**Resolution**

Check the version of the Oracle ADF Desktop Integration Runtime Add-in for Excel client that you currently have, and ask your system administrator whether you need to reinstall it. Find the version in the About section of the workbook.

If you have the correct version, then in Microsoft Excel:

1. Click the **Microsoft Office** button, and click the **Excel Options** button.
2. Select the Add-Ins tab, and check if Oracle ADF Desktop Integration Runtime Add-in for Excel is in the Inactive Application Add-ins or Disabled Application Add-ins list.
3. If Oracle ADF Desktop Integration Runtime Add-in for Excel is in the Disabled Application Add-ins list:
   a. Select Disabled Items in the Manage field and click Go.
   b. In the Disabled Items dialog box, select oracle adf desktop integration runtime add-in for excel and click Enable.
   c. Back in the Excel Options dialog box, select COM Add-ins in the Manage field and click Go.
   d. In the COM Add-Ins dialog box, select Oracle ADF Desktop Integration Runtime Add-in for Excel.

   If Oracle ADF Desktop Integration Runtime Add-in for Excel is in the Inactive Application Add-ins list, then perform only steps 3.3 and 3.4.

4. If Oracle ADF Desktop Integration Runtime Add-in for Excel is in the Active Application Add-ins list, then contact your help desk.

Note

The exact steps can vary depending on your version of Microsoft Excel.

FAQs for Desktop Integration for Excel

What's the difference between export and Oracle ADF Desktop Integration for Excel?

Use the Export button or menu option to download data to view or analyze. You get a Microsoft Excel file, of any type that Excel supports, containing selected or all records from the corresponding table. If row selection is disabled, then the export would include all rows. When all rows are exported, that includes all the rows that are not visible on the page. However, any search criteria, filters, and Query By Example values applied to the table can exclude rows from the export. Data from hidden columns are also not included in the export.

Use Oracle ADF Desktop Integration for Excel to create or edit records in a Microsoft Excel workbook and upload the records back into Oracle Fusion Applications. This feature is helpful for mass updates or working outside of Oracle Fusion Applications. In most cases, you download the desktop integrated workbook from a link in the regional area, for example the Create Expense Items in Spreadsheet link, or from a table, for example using the Prepare in Spreadsheet button. The workbooks downloaded from a link can include rows of data, or empty rows except for default values in some columns. From a table, what is included in the workbook is determined the same way as for the export option. If no rows are selected, however, the workbook does not include any records from the table.

Note

If you are using a feature integrated with Oracle Fusion Applications that presents a set number of rows per page or view, then exporting or downloading
all rows might not include all the data you want. You might need to navigate to subsequent sets of rows to export or download.

FAQs for Attachments

How can I delete attachments?

Use the Delete icon button if available. If not, that means there are no attachments or more than one attachment for the object. When the Delete icon button is not available, use the Manage Attachments icon button to open the Attachments dialog box and delete specific attachments.

Audit

Audit History: Explained

Using audit history, you can view the changes that the application data underwent. It provides you with details of the business objects that were created, updated, and deleted. You can select among several search parameters to decide the type of audit history report that you require. To view the history or to create a report, you require special access rights to the application. To access the Audit History work area, click Audit on the Navigator menu of Oracle Fusion Applications.

Report Summary

Audit history search results appear based on the parameters selected. A summary of the audit history appears in the search results table displaying key data such as date, user, event type, business object type, and description. If you need more details, you can search again with modified search criteria to get a detailed report. You can export the report summary to Microsoft Excel.

Detailed Report

The detailed audit history report appears when you use additional search criteria. This table shows how the search criteria affects the search results.

<table>
<thead>
<tr>
<th>Search Parameter</th>
<th>Result of Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Object Type</td>
<td>• Narrows the search results to that specific business object within the selected product.</td>
</tr>
<tr>
<td>Note</td>
<td>• Enables the Show Attribute Details check box.</td>
</tr>
<tr>
<td></td>
<td>This parameter is applicable only for the business objects that belong to Oracle Fusion Applications.</td>
</tr>
</tbody>
</table>
Include Child Objects

Displays all the child objects that were listed under the business object when audit was set up. For example, a sales order object that contains several items as child objects.

Note

Only the objects at the immediate parent-child level are displayed. To view the children at subsequent levels, select the child object as the business object type and search again.

Show Attribute Details

- Displays the name of each attribute that was either created, updated or deleted, and the old and replaced values.
- Enables the Show Extended Object Identifier Columns check box.

Show Extended Object Identifier Columns

Displays the instances (contexts) in which the business object was used. The context values specifically identify the objects and the transactions in which they were used. Each context is unique and assigns a unique description to the business object.

You can export the detailed report to Microsoft Excel.

Note

The default report displays a standard set of columns that contain prominent details of the audit history. To view additional details, you can customize the display of columns.

**Audit Event Types: Explained**

Events trigger the audit process, and the details pertaining to that event are stored in the audit table. When you view audit history, you can view which events triggered the changes to the object data during a specific period of time. However, for events to trigger the audit process for the business objects, it is necessary that the objects must have been selected and enabled for auditing during audit setup.

For Oracle Fusion Applications, transactional events that monitor the create, update, and delete operations trigger the audit process. The attributes of the audited object data can be used in lookups and foreign keys to display values in the audit history. Oracle Fusion Applications supports displaying the audited information as per the application’s language settings.

For Oracle Fusion Middleware products, events such as failed login attempts that are used as triggers, store the information in sandbox in absence of an audit table. The audited information is presented only in English.

Note
This topic focuses on the event types available in Oracle Fusion Applications. For details on events used in the Oracle Fusion Middleware products, refer to the Oracle Fusion Middleware documentation.

Create Operation

This event triggers audit activity whenever business object data is created and stored in the database. As a result, the name of the created object, the name of the user who created the object, the time stamp, and other details are stored that appear in the audit report.

Update Operation

This event triggers audit activity whenever existing business object data is updated. As a result, both the old and updated values of the object, the name of the user who updated it, the time stamp, and other details are stored that appear in the audit report.

Delete Operation

This event triggers audit activity whenever existing business object data is removed from the database. As a result, the last value that the object attributes contained, the name of the user who deleted the object, and other details are stored that appear in the audit report.
Use the Worklist feature to access and act on workflow tasks, which are tasks that require your attention and are routed and tracked to completion by the application. These tasks can be informational only or require your action. An expense approval is an example of a task requiring action. If an expense report is routed to you for approval, then you will see the task in your Worklist queue and receive an e-mail notification.

The Worklist feature is from the Oracle SOA Worklist Application in the Oracle SOA Suite, and described in the Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite. As you read content from that guide, note that:

- This guide is aimed at developers. Ignore sections that are not linked to from this help.

- The guide covers the Oracle SOA Worklist Application itself, so any figures depicting application pages would likely not match what you see in Oracle Fusion Applications. Though you can use the Worklist feature within Oracle Fusion Applications, you also have access to the application, for example from the Worklist: Notifications and Approvals region on the Welcome dashboard. Any changes you make in Oracle SOA Worklist Application affect your worklist in Oracle Fusion Applications as well.

**Searching for and Accessing Tasks**

- The Worklist: Notifications and Approvals region on the Welcome dashboard contains all open tasks assigned to you across all Worklist servers, each of which corresponds to a product family.

- Use filters and search to go to specific tasks in a Worklist table. The advanced search is not available in Oracle Fusion Applications.

See: How To Filter Tasks

- Use the View menu in any Worklist table to see all the Worklist servers relevant to you. When you click a server name, you go to and access the tasks in that server.
• Where available under the View menu, you can also access Worklist views, which are subsets of tasks that meet specified criteria. You can manage your views in the Oracle SOA Worklist Application.
See: How To Create Delete and Customize Worklist Views

Creating Tasks
• You can create a to-do task for yourself or others from a Worklist table.
See: How To Create a ToDo Task
• A business task is one that is created as a result of something done outside of the Worklist table, for example when you create an expense report.
• For any business or to-do task, you can create subtasks to be completed.
See: How To Create a Subtask

Acting on Tasks
• Each task provides a set of available actions appropriate to the task.
For example, an approval task allows you to approve, reject, or request information.
See: Acting on Tasks: The Task Details Page
See: How To Act on Tasks
See: Approving Tasks

FAQs for Notifications and Approvals

What's the difference between the Watchlist and the Worklist?

The Watchlist feature provides a set of shortcuts to items that you want to track or that require your attention. Use the Watchlist to see a count for each item and to navigate to the relevant work area where you can view or perform tasks on the item. For example, a Watchlist item is for expense reports awaiting submission. You can see how many expense reports you have created but not yet submitted, and click the Watchlist item link to navigate to the work area where these reports appear.

The Worklist feature presents workflow tasks that require your approval or other action, as well as notifications for you to view. Use the Worklist to manage your tasks, access their details, or take appropriate action. For example, some managers might see approval tasks for invoices, and select a particular task to approve, reject, or otherwise act on the corresponding invoice.

Note
In some cases, you can use either the Watchlist or Worklist to perform the same task. For example, managers can also use the Watchlist item for invoices requiring their approval to see all such invoices and then select the one to act on.
How can I disable or control the notifications that appear in the global area?

To disable the notifications that automatically appear in the global area, select the **Disable pop-ups** check box in the dialog box. You can still select the **Notification** icon button in the global area to manually access notifications, as well as to enable or disable the automatic notifications.

To disable notifications from the global area entirely and hide the **Notification** icon button, use preferences in Oracle SOA Worklist Application. In the Worklist: Notifications and Approvals region on the Welcome dashboard of Oracle Fusion Applications, select the server that corresponds to your product family under **View - Servers**. Once you are in Oracle SOA Worklist Application, click the **Preferences** link and then select the Notification tab. Deselect the Browser Popup channel as a default and make sure that none of the filters involve sending messages to the Browser Popup channel. Repeat these steps for other servers as desired.

In Oracle SOA Worklist Application preferences, for the selected server, you can also determine the types of notifications to receive in the global area by creating or editing filters involving the Browser Popup channel.

For more information on specifying notification settings, see the Oracle Fusion Middleware Developer’s Guide for Oracle SOA Suite.

Why can’t I find a notification that appeared earlier in the global area?

These notifications are automatically deleted from the list in the global area after 30 days, and considered read after 14 days.
Activity Streams: Highlights

Activity streams provide a streaming view of activities from other users, actions taken in spaces, and other business activities. You might see that specific users have created, edited, or deleted specific business objects, for example, that Kyle Bailey has customized the Welcome dashboard. From the activity stream, you might be able to access more information about that user or object. Additionally, similar to social networking Web sites, the activity stream displays messages that other users want to broadcast.

The activity stream is an Oracle WebCenter Portal feature, available in Oracle Fusion Applications on the Welcome dashboard and various other locations within and outside the context of spaces. The types of activities that are tracked vary depending on each individual Activity Stream region.

Activity streams are fully described in the Oracle Fusion Middleware User’s Guide for Oracle WebCenter Portal: Spaces. As you read content from that guide, note that:

- In Oracle Fusion Applications, activity streams can exist outside of spaces. Even though the guide describes activity streams only in the context of spaces, activity streams work similarly outside of spaces.
- The scope of what is potentially tracked in activity streams is different from what is described. There are many types of activities specific to Oracle Fusion Applications.
- The exact navigation or user interface in Oracle Fusion Applications might differ from what is described. You can ignore content specific to Oracle WebCenter Portal: Spaces.

Options and Preferences

- Where available, you can control the scope of what is displayed in specific Activity Stream regions.

See: Selecting the People to Stream in an Activity Stream Instance
See: Selecting the Spaces to Stream in an Activity Stream Instance
See: Selecting the Services to Stream in an Activity Stream Instance

- For a specific activity stream, you can also hide activities from individual users or spaces.

See: Hiding and Showing the Activities of a Selected User

See: Hiding and Showing the Activities of a Selected Space

- If you have access to the Oracle Fusion Applications activity stream preferences, then you can determine the types of Oracle Fusion Middleware Extensions for Applications (Applications Core) activities to track. Applications Core activities are only displayed in the Activity Stream region on the Welcome dashboard for administrators with appropriate roles.

**Using Activity Streams**

- In the Activity Stream region on the Welcome dashboard, you can publish a message that is displayed in the activity streams of all users, or only those with access to a selected space.

See: Selecting the Recipients of a Published Message

- Where you have access, you can also post a message for a specific user.

See: Posting a Private Message

- Where available, you can comment on or express a liking for specific activities.

See: Liking and Commenting On Activity Stream Items

- Where available, you can share a particular item in your activity stream with others.

See: Sharing Files and other Objects Through an Activity Stream Item

**Announcements: Highlights**

Announcements offer a quick, convenient way to create and distribute messages instantly or at a time you specify. The announcements feature is an Oracle WebCenter Portal service, used within Oracle Fusion Applications most prominently in spaces.

Announcements are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces. As you read content from that guide, note that:

- In Oracle Fusion Applications, announcements can exist outside of spaces. Even though the guide describes announcements only in the context of spaces, announcements work similarly outside of spaces.

- The way to access announcements in Oracle Fusion Applications can be different from what is described, especially if the feature is available outside of spaces.
Understanding Announcements

- Even when outside of spaces, announcements are still integrated with other Oracle WebCenter Portal services.

See: What You Should Know About the Announcements Service

Using Announcements

- If you have access to a page where announcements are available, then you can view announcements and adjust your view of them. When outside of spaces, only the discussions server system administrators can create, edit, and delete announcements.

See: Working with the Announcements Task Flow

- If you have access to view or manage announcements, then you can send particular announcement messages through e-mail.

See: Sending Mail from an Announcement

- If you have access to view or manage announcements, then you can link announcements if links are configured in your application.

See: Linking Announcements

Discussions

Using Discussions: Highlights

Discussions let you create and participate in text-based discussions with other users within the scope of specific business objects, an application, or a space. For example, in Oracle Fusion Applications Help, you can post questions or comments regarding topics covered by a specific help file, and view posts from others regarding the same help.

The discussions feature is an Oracle WebCenter Portal service used within and outside of spaces in Oracle Fusion Applications.

Discussions are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces. As you read content from that guide, note that:

- In Oracle Fusion Applications, discussions can exist outside of spaces. Content specific to spaces does apply to spaces within Oracle Fusion Applications, but discussions work similarly outside of spaces.

- There are various user interfaces, or task flows, described in the guide. What is available to you depends on the pages that you have access to.

Participating in Discussions

- Within a discussion, moderators create forums in which you can view and participate in the topics, or threads.
See: Creating and Managing Forum Topics and Replies

- You can watch discussion forums or topics to receive notifications whenever anyone posts.

See: Watching Forums and Topics

- You can send contents of a discussion topic to others using e-mail, as well as link from a topic to another object.

See: Sending Mail from Discussion Topics

**Moderating Discussions: Highlights**

As moderators of discussions, you can create and manage discussion forums, as well as manage the content of specific forums. The discussions feature is an Oracle WebCenter Portal service used within and outside of spaces in Oracle Fusion Applications. In Oracle Fusion Applications, discussion posts are stored in a WebCenter table and the FUSION_WEBCENTER schema.

Details about moderating discussions are included in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces and the Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal. As you read content from these guides, note that the security described does apply to discussions within spaces in Oracle Fusion Applications, but additional security applies, especially to discussions outside of spaces.

**Understanding Discussions**

- Not all discussions user interfaces, or task flows, are available in Oracle Fusion Applications, and you can disregard content specific to the Oracle WebCenter Portal: Spaces application. Refer to the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces.

See: What You Should Know About the Discussions Service

- Moderators of discussions within and outside of spaces must have the necessary roles, including the administrator role. Refer to the Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal.

See: Granting Administrator Role on the Discussions Server

**Managing Forums**


See: Creating a Discussion Forum

See: Editing the Forum Name and Description

- You can also edit or delete others' posts, including individual posts or entire threads. Refer to the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces.

See: Editing Topics and Replies
See: Deleting Topic Posts and Replies

Links: Highlights

Links provide a way to view, access, and associate related information. The links feature is an Oracle WebCenter Portal service, used within Oracle Fusion Applications within and outside of spaces. The objects that you can link to are other Oracle WebCenter Portal services, for example announcements and discussion topics, or items used within spaces, for example documents and notes.

Links are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces. As you read content from that guide, note that in Oracle Fusion Applications, links can exist outside of spaces. Even though the guide describes links only in the context of spaces, links work similarly outside of spaces.

Using Links

- You can link from announcements, discussions, documents, events, lists, and pages, where available. Documents, events, and lists are available only within spaces.

See: What You Should Know About the Links Service

See: Working with Links Service Features

Spaces

Using Spaces: Highlights

Spaces support the collaboration of project teams and communities of interest by providing a dedicated and readily accessible area for relevant services, pages, and content, and by supporting the inclusion of specified members. Spaces include various collaboration features such as discussions, wikis, blogs, and so on. Spaces are an Oracle WebCenter Portal feature used not only in the Oracle WebCenter Portal: Spaces application but also throughout Oracle Fusion Applications.

Spaces are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces. As you read content from that guide, note that:

- You can disregard content specific to the Oracle WebCenter Portal: Spaces application, for example the home space. Even though there is no home space in Oracle Fusion Applications, many of the features within the home space are also available in Oracle Fusion Applications.

- The way to access spaces in Oracle Fusion Applications is different from what is described. In Oracle Fusion Applications, you can use the
**Spaces** link on pages where available, as well as the WebCenter Services dashboard on the home page.

**Understanding Spaces**

- Spaces bring people together in a virtual environment for ongoing interaction and information sharing, enabling the formation and support of social networks.

  See: What You Should Know About Spaces
  See: What Does a Space Look Like?

**Joining and Viewing Spaces**

- To join a space, you can be invited by someone else, in which case you receive a notification. To see all the spaces that you can join, go to the WebCenter Services dashboard, which contains a list of the spaces you are currently a member of, recommended spaces, and a search for all public spaces you can join.

  See: Changing Your Role in a Space
  See: Cancelling Space Membership

- If you have access to do so, you can create a space if you cannot find an appropriate one to join. You are then by default the moderator of that space.

- You can also link your personal business objects, for example your own goals, to a space. Only you, or also select others depending on security, can access those personal objects.

- The content of a space depends on the tools and services made available by the space moderator.

  See: Viewing Pages in a Space
  See: Managing Your Pages in a Space

**Moderating Spaces: Highlights**

When you create a space, you are the default moderator of that space. Spaces are an Oracle WebCenter Portal feature used not only in the Oracle WebCenter Portal: Spaces application but also throughout Oracle Fusion Applications.

Details about managing spaces are included in the Oracle Fusion Middleware User’s Guide for Oracle WebCenter Portal: Spaces. As you read content from this guide, note that:

- The security described does apply to spaces in Oracle Fusion Applications, but additional Oracle Fusion Applications security applies.

- You can disregard content specific to the Oracle WebCenter Portal: Spaces application, for example the home space. Even though there is no home space in Oracle Fusion Applications, many of the features within the home space are also available in Oracle Fusion Applications.
Creating and Maintaining Spaces

As moderators, you can create spaces, determine their design and content, and manage members. Your own roles determine what is available for you to add to the space.

- Use space templates to determine the design of the space.
  See: Working with Space Templates
- Some spaces can be automatically created, in certain applications. In most cases, you manually create spaces in the context of a business object or project, for example regarding a specific opportunity, or from space administration pages.
  See: Managing a Space
- Spaces can contain nested spaces.
  See: Working with a Space Hierarchy
- Instead of creating a new space, you can alternatively link an existing space to the current business object. This is useful when a single space is to be used across multiple objects or within multiple work areas. For example, you can link a specific project to a space. All members of the project would then also have access to the linked space.
- You control the roles and privileges of space members. Aside from inviting members as described, you can also invite them elsewhere in Oracle Fusion Applications.
  See: Managing Space Members and Roles

Tags: Highlights

Use tags to categorize business objects in Oracle Fusion Applications, for example specific invoices and opportunities, with your own keywords. You can share tags so that anyone searching or browsing for items can find them based on common tags. For example, members collaborating on a project can tag all related work with a particular term. Though tags are available to anyone who has access to the item, you can designate tags to be private when you create them.

The tags feature is an Oracle WebCenter Portal service.

Tags are fully described in the Oracle Fusion Middleware User’s Guide for Oracle WebCenter Portal: Spaces. As you read content from that guide, note that:

- You can disregard discussions specific to the Oracle WebCenter Portal: Spaces application, for example the global search in the application.
- While the guide describes tagging application pages and documents, in Oracle Fusion Applications, you tag specific business objects.
- Not all tag features are available in Oracle Fusion Applications, for example the Tags and Similarly Tagged Items user interfaces.
Understanding Tags

- Aside from the Tags icon and the Tag Center dialog box, tags are available in Oracle Fusion Applications from applicable Oracle Fusion Applications Search results. The search considers tags in finding matching results. The search results do not indicate the number of times a particular tag was applied, and not all searches, for example the one in the global area, retrieve private tags.

See: Understanding Tags

- You can access the Tag Center dialog box from global area (Favorites and Recent Items - Favorites - Tags) or other places in Oracle Fusion Applications, for example in Oracle Fusion Applications Help. The tag center shows all tags, not just those relevant to what you are working on. For example, the tag center in Oracle Fusion Applications Help displays all tags, not just those that help files are tagged with.

See: Understanding the Tag Center

Using Tags

- Use the Tags icon to tag specific business objects. Read only about the step that describes the fields you enter to tag an item.

See: Tagging Application Pages

- Browse and search for items using tags in the Tag Center dialog box. Disregard instructions about how to open the tag center.

See: Working with Tags and Tagged Items in the Tag Center

FAQs for Collaboration Features

Why can't I see any associated items for a tag in the tag cloud?

You can see all tags in the Tag Cloud section of the Tag Center dialog box; however, you can see specific items associated with a tag only if you have access to those items based on security.
What does social networking have to do with my job?

Social networking isn’t just for social situations anymore.

Here are some key reasons for using Oracle Social Network Cloud Service in your business applications:

- In a business object, open Conversations on the spot and discuss details while looking at them. No worries about keeping two sets of data in sync. The details you see in your business application are the same you see in Oracle Social Network Cloud Service.

- All communications are organized automatically by business object, so no wasted time with filing and searching through e-mails.

- Quickly engage resources as needed to address an issue or solve a problem. Invite new members to the Conversation so they can easily see the complete history.

- Integrate Oracle Social Network Cloud Service into your daily workflow using the Outlook plug-in. Drag and drop relevant e-mails into a Conversation to instantly share with the rest of your team.

- Call attention to important information for specific people or everyone on the team.

- Share presentations and other documents, and get input from other team members. Web conference not required. Juggling e-mail responses not required. Comments are posted directly to the document in context.

- Get real-time notifications about updates to key Conversations and follow-ups.

- Develop and expand your professional network.

- Connect and engage with others covering the same industry, product specialization, or geography.

Note
Oracle Social Network is currently available in Cloud implementations only.

How can I see the social activity surrounding an Oracle Fusion Application business object?

First you share the business object with the Oracle Social Network Cloud Service. Business objects that are shared with Oracle Social Network are called Social Objects. Social Objects have access to all kinds of social networking features, like Conversations, walls, and easy document collaboration. You can share a business object by clicking the Social link in the detail area of the business object and then clicking the Share button in the slide-in panel. If one of your co-workers has already shared the business object, all you need to do is join the Social Object. You can do that by clicking the Join button in the slide-in panel. Sharing or joining a Social Object lets you participate in social activities revolving around the object. For instance, you can have online Conversations with others about the object while looking at the object’s details; you can follow others who are interested in the object, and track their social networking activities. If you want to see all the Conversations and walls that are available to you, irrespective of Social Object, click the Social link in the global header.

How can I collaborate with people who don't have access to Oracle Fusion Applications?

You can bring any internal user who has a login to your instance Oracle Social Network Cloud Service into any Conversation or wall that you’re a member of - even if they don’t have access to your business applications. You can invite people who don’t have a login to join the social network. They can click a link in the invitation to register and start networking.

To add someone to a Conversation or wall:

1. In the detail area of a business object, click the Social link to open the Oracle Social Network slide-in panel.
2. In the slide-in panel, click the Social Object’s name to open its wall.
3. On the wall, click Add People to open the Update Member dialog, and move the person’s name from the left column to the right column.

Tip
In the Update Member dialog, you can also search for people. Click their names in search results to add them to the right column.

4. Click Save.

Now the person you added can see your wall posts from any Oracle Social Network Cloud Service client, and you can see that person’s posts from those clients and your Oracle Fusion Applications.
What happens if I share or join a Social Object?

Once you share or join a Social Object, you can view updates to the business object instantly from any Oracle Social Network Cloud Service client, including your browser, mobile device, and Microsoft Outlook application.

You can also:

- Post messages that all members of the Social Object will see.
- Post files, then preview them, mark them up, and add comments to them.
- Post links pointing to other Conversations, documents, and Social Objects.
- Flag a post for follow-up to call one or more members’ attention to it.
- See and navigate to Conversations related to the Social Object.

Tip

You see just those Conversations you’re a member of or that are available to you to join (public Conversations).

- See everyone else who’s a member of the Social Object, and connect with them by adding them to your list of contacts, starting a One-on-One Conversation with them, or navigating to their profiles.
- Manage the Social Object’s wall, including:
  - Managing its membership
  - Muting it to hide it from your view of social networking activity
  - Grabbing its URL
  - Navigating to a view of it in your browser
- Navigate back to the business object’s details in Oracle Fusion Applications.

What’s the difference between Conversations, a Social Object’s related Conversations, and a Social Object’s wall?

It might be useful to know what they have in common first: All of them are pages where you can post messages and other types of content that other members can read and reply to. All of them preserve this information so that it can be revisited and added to anytime, anywhere.
A **wall** is a page attached to a given Social Object where you can post messages. All members of the Social Object can post to its wall and read what other members have posted. System generated updates on the business object are also posted to the wall.

A **Conversation** is an online discussion typically about a topic of interest to a group of people. For example, a subject like "Leveraging Data from Business Applications," doesn't apply to any one business object, more like all of them. So, rather than creating a related Conversation - more closely tied to a particular business object - you might create your "Leveraging Data from Business Applications" discussion as a regular Conversation. You can make the Conversation publicly available, so anyone with a login can join and participate. You can limit the Conversation's membership to just those people who work with a particular business object or just some of those people.

A **related Conversation** is more closely tied to a given business object by appearing in a list of Conversations on its Social Object's wall. The posts in related Conversations center around that Social Object. For example, consider a Social Object with related Conversations about strategizing, leveling, sourcing, and the like. Such Conversations may be listed on the Social Object's wall - provided they were added to it. They'll also appear on the list of Conversations that opens when you click the Social link in the global area, provided you're a member of those Conversations. That is, they’re not available only through the Social Object they’re related to, but also through the Social Object, on its wall's Conversations tab.

**How can I start a Conversation?**

For business objects that are shared as Social Objects, both the global and detail areas on the business object page provide a **Social** icon (global) and link (detail). Click either to open the Oracle Social Network Cloud Service slide-in panel and start creating a new Conversation.

To start a Conversation:

1. In the global area, click the **Social** icon to open the slide-in panel, and then click the **New Conversation** button to create a new Conversation.

2. In the business object detail area, click the **Social** link to open the slide-in panel, and then click the **New Related Conversation** button to create a Conversation that is related to the currently shown Social Object. A link to this related Conversation appears on the **Conversations** tab of the Social Object's wall.

---

**Note**
You don’t need to have access to a business application to create and participate in its Conversations and walls. As long as you have a login to the same instance of Oracle Social Network Cloud Service that is integrated with the business application, you can create, join, or be added to its Conversations and walls. Keep in mind that, with members-only Conversations and walls, someone who is already a member must add you.

How can I add several people to a Conversation simultaneously?

Use groups to add several people to a Conversation simultaneously. You can see groups when you click the Add People button in a Conversation window. This opens the Add Members dialog, where you can add a group to a Conversation by moving it from the left column to the right column.

Tip
You can create groups in the Oracle Social Network Cloud Service web client.

How can I keep up with my Conversations on the road?

Oracle Social Network Cloud Service, the application that provides all your Oracle Fusion application’s social networking features, is available to other environments, too. Besides your browser, you can access your social network from your phone, and your Microsoft Outlook application. Mobile clients are available for download from your app store (Apple for iPhone/iPad and Google Play for Android). The Outlook client is available from the Downloads page in Oracle Social Network Cloud Service.

How can I share a document with others?

With social networking, you have many options for sharing documents. For example, you can:

- Upload a document to a Social Object’s wall and flag the upload to bring it to someone’s attention
- Share a document that was uploaded to a Social Object’s wall with another Social Object
- Simultaneously review the same document with another Conversation member

Every member of the Social Object can see the mark-up and comments of other members. This reduces - even eliminates - duplicate and contradictory remarks.
How can I share a document between Social Objects?

After a document is uploaded to a Social Object’s wall, you can share the document with another Social Object. Sharing a document copies it from its source Conversation or wall to a selected Conversation or wall. You can share a document using the Documents tab on the Social Object’s wall.

To share a document uploaded to a Social Object’s wall with another Social Object:

1. Go to your Oracle Fusion application, and open the business object where the document is posted.
2. Click the Social link in the object’s detail area to open a slide-in panel on the right side of your screen.
3. In the slide-in panel, click the Social Object's name to open its wall.

Tip
On the right side of the wall, you can see links to Wall, Conversations, Documents, and Gadgets. Think of them as tabs.

4. Click the Documents tab, and select the document you want to share.
5. Click the Share link, and select Share in existing to select from a list of existing Conversations and walls.
6. Choose a tab to narrow your destination options:
   - Favorites to select from your favorite Conversations and walls.
   - Recent to select from recently active Conversations and walls.
   - Search Results to enter a search term and select from the results
7. Select the destination Social Object, and click Share to post the document to its wall.

How can I upload a document?

You can upload a document to a Social Object’s wall using the tUpload a Document icon on the Social Object’s wall.

To upload a document:

1. Go to your Oracle Fusion application, and open the business object.
2. Click the Social link in the object’s detail area to open a slide-in panel on the right side of your screen.
3. In the slide-in panel, click the Social Object’s name to open its wall.
Tip

On the right side of the wall, you can see links to Wall, Conversations, Documents, and Gadgets (think of them as tabs). Make sure Wall is selected.

4. Click the Upload a Document icon (paperclip) under the Message field to open a document upload area in the slide-in panel.
5. Click the Select Files button, and navigate to and select the document.
6. Click Start Upload.

Note

After uploading a document, you can click Add Comment and write a message to post along with the article.

Your document, with any comment you added, is posted to the Social Object’s wall, where all members of that object can see your post and preview the article.

How can I review a document?

You and one or more colleagues can collaborate on a document simultaneously by reviewing it together in real time using the annotation tools on the Social Object’s wall. You can enter and see each other’s annotations - a combination of mark-up and comments - when they are entered.

To review a document:

1. Go to your Oracle Fusion application, and open the business object where the document is posted.
2. Click the Social link in the object’s detail area to open a slide-in panel on the right side of your screen.
3. In the slide-in panel, click the Social Object’s name to open its wall.
4. Click Expanded View below the posted document to open a preview of it.

Tip

Document previews are limited to the first 100 pages of a document.

5. In the preview (these steps are just an example; you can use annotation tools however you like):
   a. Select the Pushpin from the Tools menu.
   b. Click the spot to place the Pushpin.

Note

Mark-up tools include:
• For the pushpin, click the spot you want to mark.

• For the drawing tools, drag them to surround or highlight the text you want to mark. Drawing tools include a pen, highlighter, rectangle, and ellipse.

All of these actions open a dialog where you can enter your remarks.

c. Enter a comment in the dialog.

6. Click Continue to keep marking and commenting on the document.

All of the marks and comments you add from this point are included in one group, which you can expand and collapse on the Social Object’s wall. Within this group, you can keep using the Pushpin or pick another markup tool.

You can start a new group of remarks by clicking Publish and then adding a new remark.

Tip

You can wait until you’re done to click Publish, but clicking Publish saves the remarks you have entered so far. Clicking Publish often is a safer way to go.

7. When finished, click Publish one last time.

How can I collaborate with several people at once?

You have lots of opportunities to collaborate once the Social link appears in the global area of your Oracle Fusion application.

You can:

• Start a Conversation

• Post to a wall

• Review a document

• Chat with another member

Use your imagination! Build your social networking skills by finding new ways to collaborate, cooperate, and communicate.

How can I post to a wall?

A wall is a page in Oracle Social Network Cloud Service that is dedicated to a Social Object, a person, or a group. Everyone who is a member of a Social Object
or group (or who is following a particular person) can see the associated wall. To post to a Social Object’s wall, click the name of the Social Object to open the wall and add your post. Or to post to a person’s wall, first follow the person, then visit the person’s wall and post questions, congratulations, industry news - it’s up to you.

How can I chat with another member?

Wherever you see someone’s profile picture, click it, and you will be taken to that person’s wall. Select Start Conversation to open a One-on-One Conversation with that member. If the members are not available now, they’ll see your message the next time they’re active in any Oracle Social Network Cloud Service client.

How can I let others know that I need their immediate feedback?

You can assign a flag to them requesting that they do so.

To assign a flag:

1. In the detail area of a business object, click the Social link to open a slide-in panel on the right side of the page.
2. In the slide-in panel, click the Social Object’s name to open its wall or click a Conversation name to open the Conversation.
3. To open the flag dialog, click the Flag icon next to the post you want them to look at.
4. Click the flag to the left of the person you want to notify.
5. Optionally, click Flag me when one of my follow-ups is cleared to get your own flag when someone clears a flag you assigned.
6. Click outside the dialog to close it.

How can I get more help on how to use Oracle Social Network Cloud Service?

When you open the Oracle Social Network Cloud Service slide-in panel in your Oracle Fusion Applications, click the question mark icon in the slide-in panel banner to open the Help Center, where you can find out how to do everything available in Oracle Social Network Cloud Service.
Scheduled Processes: Explained

Use scheduled processes to manipulate records in a batch for a specific business need. Processes can be scheduled and submitted to achieve a desired result that impacts a select set of records, for example to create, update, or delete records. Other processes provide printable output that contains information based on records. Some processes do both, for example, creating records and providing a report about the new records.

Each process that you run is based on a job, which is the executable that determines what options are available to you and what the process can do. You can submit the same process using different parameters and other settings. Each process submission has a unique process ID.

A process can also be based on a job set, which contains multiple jobs to be included in one process submission. In some cases, when you submit a process, other processes are invoked to automatically run, based on logic. This is not the same as a process set, which is a defined set of processes.

You can:

- Submit most predefined processes directly on the pages you work in.
- Always access the Scheduled Processes Overview page, using Navigator - Tools - Scheduled Processes, to run and monitor all processes that you have access to.
- Use the Reports and Analytics pane to submit business intelligence reports that are registered as scheduled processes. This pane is available in various work areas, including the Reports and Analytics work area (Navigator - Tools - Reports and Analytics).

Note

For lists of predefined scheduled processes, see assets with the Scheduled Process type in Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).
Parameters

A process might have parameters that you can set to control which records are included or how they are to be affected by the process. For example, date range parameters can limit the scope of the process to records that are effective within a period that you specify. In some cases, you might see conditional parameters, which are made available to you only after you set a specific parameter and are based on the value that you entered for that parameter.

Schedule

The default schedule for a process is to run as soon as possible. If you select the advanced mode in the Process Details dialog box, you can specify the exact dates and times to run the process, or set the process to run at a specified interval within a date range. If available, you can also select a saved schedule that your administrator has defined.

Output

Many processes provide printable output that presents specific information in a predetermined template. These processes, or the output itself, are also referred to as reports. There are many types of reports, for example financial or regulatory statements and listings of records that meet specified parameters. If you select the advanced mode in the Process Details dialog box, you can set more output options.

Notification

You can select to receive an e-mail when the process ends. If you select the advanced mode in the Process Details dialog box, you can also determine which users are notified if the process ends with a specified status.

Process Sets: Explained

A process set is a type of process that contains at least two processes to be run in a specific order as part of one submission in serial or parallel, or based on other predetermined logic. Process sets can contain any number of individual processes as well as other process sets.

There can also be multiple levels of nested process sets within a single process set. For example, a process set can include three processes and two process sets, one of which contains another process set.

Just as individual processes are based on jobs, process sets are based on job sets. A job set is a predefined set of jobs to be included in one process submission, and a job set itself can contain nested job sets.

To submit a process set from the Scheduled Processes Overview page, proceed as you would to submit any process, but select Job Set for the Type option group.
A process set itself does not have parameters; you set parameters for individual processes within the set as needed. You do determine schedule, output, and notifications for the entire process set as you would for any process submission.

**Hierarchy**

When you select to run a process set, the Processes tab in the Process Set Details section lists all the individual jobs in the job set that the process set is based on.

Each job and job set within the job set that you are submitting is considered a step and has a unique step ID. The Path column shows the step ID of the job, preceded by the step IDs of its parent job sets within the hierarchy, if any. You use the path information mainly to differentiate between multiple instances of the same job within a job set.

The Job Set column in the Processes tab represents the parent of each job in the hierarchy.

For example, you are submitting a process set based on Job Set A. This job set contains Job 1 (with a step ID of Step1) and Job Set B (Step2), which contains Job 2 (Step2a) and Job 1 again (Step2b). This table shows what the Processes tab displays for this example.

<table>
<thead>
<tr>
<th>Job Definition</th>
<th>Path</th>
<th>Job Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job1</td>
<td>Step1</td>
<td>Job Set A</td>
</tr>
<tr>
<td>Job2</td>
<td>Step2.Step2a</td>
<td>Job Set B</td>
</tr>
<tr>
<td>Job1</td>
<td>Step2.Step2b</td>
<td>Job Set B</td>
</tr>
</tbody>
</table>

**Process Options: Examples**

When you schedule a process, click the **Process Options** button to set options, such as language and time zone. If you are submitting the process to run on a schedule, your settings apply to every run in the schedule.

Process options affect the data to be processed, as well as the output template text, if any. These options override what is set in general preferences under **Personalization - Set Preferences**.

**Language**

You set the language process option to Spanish, while your general language preferences have the Current Session field set to Japanese. The report output template text and report data are displayed in Spanish. If you do not set the language process option, then the report is displayed in Japanese.

**Currency**

You set the currency process option to Euro, while your general currency preference is set to Yen. The process performs calculations based on the Euro and the output displays all monetary amounts in Euro.
Managing Submitted Processes and Viewing Output: Points to Consider

After you submit a scheduled process, you can manage it, for example, by canceling the process while it is still running. You can also view the report output, if any, that is available when the process ends.

Managing Submitted Processes

Monitor the progress of the scheduled process in the table on the Scheduled Processes Overview page or elsewhere. Refresh the table to get the latest status.

After the process completes, you can:

- View the report output that the process generated, if any.
- View the log, which provides information about the process submission, such as details about why it resulted in error.
- Resubmit the same process.

If you are on the Scheduled Processes Overview page, you can also:

- Manage the process while it is still running:
  - Cancel the process submission.
  - Put the process run on hold.
  - Release the process so that it is no longer on hold and continues to run.
- View submission notes, which is text that you entered when submitting the process.
- View completion notes, which are automatically generated when the process reaches a final state, summarizing how the process completed.

Viewing Output

On the Scheduled Processes Overview page, select the process and go to the end of the Details section. On other pages, use the View Output column in the table where you monitor submitted processes.

You can republish to view or export the output in a different format, without resubmitting the same process.

1. Click the **Republish** button
2. Click the **Actions** icon button.
3. Hover on **Export** and select a format.

Note
There is no difference between selecting the Data format and using the XML Data icon button next to the Republish button.

## Scheduled Process Statuses: Explained

After you submit a scheduled process, it can go through many statuses until a last one, when the process reaches a final state.

This table explains the possible process statuses, and the Action Required column indicates that:

- **No (in progress)** - The process was submitted and has not yet reached a final state. You or administrators don’t need to do anything to move the process along.
- **Yes** - You or administrators need to do something to get the process to another status.
- **No (final)** - The process is done running, and nothing else can be done for the process.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Action Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blocked</td>
<td>At least one other running process is incompatible with and currently blocking your process. The situation will be automatically fixed.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Canceled</td>
<td>The process was canceled. You can’t restart it, but you can resubmit with the same parameters or submit a new process.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Canceling</td>
<td>The process is currently moving to the Canceled status.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Completed</td>
<td>The main part of the process completed and postprocessing, such as sending notifications and generating output, has started.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Error</td>
<td>The process finished running and ended in error.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Error Auto-Retry</td>
<td>The process ended in error but will automatically run again.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Error Manual Recovery</td>
<td>The process ended in error and requires an administrator to retry to move the process to a final state.</td>
<td>Yes</td>
</tr>
<tr>
<td>Expired</td>
<td>The process didn’t run before the end of its schedule. You can’t restart it, but you can resubmit with the same parameters or submit a new process.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
<td>Final/Progress</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Finished</td>
<td>The main part of the process and postprocessing have completed. The process will move on to a final state.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Hold</td>
<td>The process is put on hold and needs someone to release it before it can continue running.</td>
<td>Yes</td>
</tr>
<tr>
<td>Paused</td>
<td>The process is paused so that another process that was automatically invoked can run first.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Pending Validation</td>
<td>Some validations, for example related to security, are performed on the process before it can start running.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Ready</td>
<td>The process passed validation and is about to start running.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Running</td>
<td>The main part of the process is currently running.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Schedule Ended</td>
<td>The process already reached a final state, and its schedule has ended.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Succeeded</td>
<td>The process is completely done, and everything was successful.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Validation Failed</td>
<td>The process failed validation and requires an administrator to resolve the issue.</td>
<td>Yes</td>
</tr>
<tr>
<td>Wait</td>
<td>The process passed validation but is not able to start running yet, due to system resources.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Warning</td>
<td>The process finished running and ended with a warning, for example a notification failed to send.</td>
<td>No (final)</td>
</tr>
</tbody>
</table>

### FAQs for Processes

**How can I change the report output for the scheduled process that I’m submitting?**

Use the advanced mode in the Process Details dialog box to go to output options for the scheduled process that you are submitting. If you don’t define any output settings, you’ll get the default output.

1. Click the **Advanced** button in the Process Details dialog box.
2. Open the Output tab.
3. Add at least one output document to be generated with the selected layout and format.
Scheduled Processes

Note

For format:

- **PDF** - Is the best option if you want to print the output.

- **Excel (mhtml)** - Supports embedded images, such as charts and logos, but can be opened only in Excel 2003 or higher.

- **Data** - Gives you report data in XML, used mainly for customizing layout.

4. You can define one or more destinations to send each output document to, for example to a particular e-mail recipient or printer.

**Why are processes displayed in a hierarchy?**

A process with lower levels below it might be a process set. The hierarchy represents the organization of processes or process sets within a specific process set.

A process might invoke other processes to run automatically, so those processes are displayed in the hierarchy on the level below the original process.
Business Intelligence: Overview

Business intelligence provides select data that you can analyze to gain actionable insight. The main business intelligence tools used in Oracle Fusion Applications are Oracle Business Intelligence Enterprise Edition and Oracle Business Intelligence Publisher.

Online Analytics
Oracle Business Intelligence Enterprise Edition is integrated with Oracle Fusion Applications to provide ad hoc reporting, allowing you to view and work with analyses and dashboards.

- **Analyses**: Graphs or tables that display specific sets of data
- **Dashboards**: One or more pages containing multiple analyses

Oracle Fusion Applications provides predefined analyses and dashboards to support ad hoc reporting on transactional data. The overall solution for real-time reporting in Oracle Fusion Applications is also referred to as Oracle Fusion Transactional Business Intelligence.

You can also use predefined analyses and dashboards for warehouse data only if you have data warehouse implemented. Oracle Business Intelligence Applications is the data warehouse system used with Oracle Fusion Applications.

Reports
Oracle Business Intelligence Publisher is integrated with Oracle Fusion Applications to meet operational and statutory reporting requirements. You can view and schedule reports that provide data in a printable format.

Predefined reports are provided in Oracle Fusion Applications. Many are already registered as scheduled processes; you can submit and monitor them as you would any process.

Other Business Intelligence Tools
Many tables on UI pages allow you to export the rows to a Microsoft Excel workbook. You can use the exported data for analytical purposes.
Other tools are used in some product families or products, for example Oracle Real-Time Decisions and Oracle Essbase.

**Access and Navigation**

You usually view or work with analyses, dashboards, and reports directly on the pages that you have access to, including the Reports and Analytics pane where available in the work areas you use. In addition, the Reports and Analytics work area, which you open with Navigator - Tools - Reports and Analytics, provides all business intelligence analyses, dashboards, and reports that you have access to.

**Note**

For lists of predefined reports and analytics, see assets with the Report type in Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsor.oracle.com). You can also find information about predefined scheduled processes by viewing assets with the Scheduled Process type.

**Business Intelligence Catalog: Highlights**

Business intelligence objects, including analyses, dashboards, and Oracle Business Intelligence (BI) Publisher reports, are stored in the Oracle Business Intelligence Presentation Catalog, which is part of Oracle Business Intelligence Enterprise Edition. For Oracle Fusion Applications, the catalog can also contain some financial reports.

You can access the entire catalog whenever you navigate from Oracle Fusion Applications to Oracle BI Enterprise Edition, for example through the Reports and Analytics pane. The exact BI objects that you have access to within the catalog, and what you can do with those objects, depends on security.

The Oracle BI Presentation Catalog is described in the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition.

**Using the Catalog**

- You store any BI object that you create for yourself in the My Folders area in the catalog, so that only you have access to it. If you have permissions to create or edit BI objects and share them with others, you must save them in the Custom folder under the Shared Folders area. The BI object is available to anyone with access to the folder.

  See: What is the Oracle BI Presentation Catalog?

  See: Saving Business Intelligence Objects

- Administrators with appropriate roles (not available in Oracle Cloud implementations) can save to any folder in the catalog that they have access to.

- From the catalog, you can find objects to view or manage.

  See: Searching with the Basic Search
Business intelligence analyses and dashboards are interactive analytics that display select data to aid in decision-making. An analysis extracts a specific set of data and presents that information in a graph or table. Analyses usually use real-time (transactional or operational) data. A dashboard is one or more related pages containing multiple analyses and possibly other content.

Analyses and dashboards are part of Oracle Business Intelligence (BI) Enterprise Edition functionality and categorized in the Oracle Business Intelligence Presentation Catalog, as well as the Reports and Analytics pane, with the Analysis and Dashboard type. In addition to viewing predefined analyses and dashboards, you can create and edit analyses and dashboards if you have the appropriate roles.

Note
Creating dashboards is currently not available in Oracle Cloud implementations.

Analyses and dashboards are described in the Oracle Fusion Middleware User’s Guide for Oracle Business Intelligence Enterprise Edition. As you read content from this guide, note that the guide is describing Oracle BI Enterprise Edition, not analyses and dashboards specifically in Oracle Fusion Applications.

For lists of predefined analyses and dashboards, see assets with the Report type in Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

**Viewing Analyses and Dashboards**

- You view most of the predefined analyses and dashboards for Oracle Fusion Applications on the pages where you do your work. Information relevant to your current tasks would be available. To access analyses and dashboards, you can also use the Reports and Analytics pane, which is available in many work areas, including the Reports and Analytics work area.

- Though analyses are usually based on real-time data, you can also run trend and historical analyses of long range data stored in a data warehouse that is specifically dedicated to analytics. You might not see any data for a trend or historical analysis if you do not have roles allowing access to view that data. Likewise, you cannot view data for warehouse dashboards if you do not have data warehouse implemented.

**Creating and Editing Analyses**

Create and edit analyses using either BI Composer, a wizard for creating and editing analyses, or Oracle Business Intelligence Enterprise Edition. When you edit predefined analyses, whether you perform a save or save as, you can only save a copy in either My Folders or the Custom folder within Shared Folders. Only administrators with appropriate roles (not available in Oracle Cloud
implementations) can edit predefined analyses directly and save to any folder in the catalog that they have access to.

- To create and edit analyses, access the BI Composer using the Create button in the Reports and Analytics pane toolbar or the Edit link for a specific analysis in the pane.

See: What Are the Steps for Creating or Editing an Analysis in BI Composer?

See: Creating Analyses Using BI Composer

See: Editing Analyses Using BI Composer

- You can also work with analyses in Oracle BI Enterprise Edition, which you access using the Browse Catalog icon button in the Reports and Analytics pane toolbar or by clicking the More link for a specific analysis. New analyses and changes to existing analyses that you make in Oracle BI Enterprise Edition are reflected and available from Oracle Fusion Applications.

See: Creating Analyses

- Optionally use agents to deliver analyses output to select individuals.

See: Delivering Content

Creating and Editing Dashboards

- To edit dashboards, use the More link for a specific dashboard in the Reports and Analytics pane, which takes you to Oracle Business Intelligence Enterprise Edition. Alternatively, access Oracle BI Enterprise Edition using the Browse Catalog icon button in the Reports and Analytics pane toolbar. Once in Oracle BI Enterprise Edition, you can also create new dashboards.

See: Building and Using Dashboards

- To edit predefined dashboards, you must first make a copy and save it in either My Folders or the Custom folder within Shared Folders. Only administrators with appropriate roles (not available in Oracle Cloud implementations) can edit predefined dashboards directly and save to any folder in the catalog that they have access to.

Oracle Business Intelligence Publisher Reports: Highlights

Oracle Business Intelligence (BI) Publisher reports are used in Oracle Fusion Applications for high volume reporting, for example payroll reports, as well as statutory reports and other highly formatted, detailed reports. In the Oracle Business Intelligence Presentation Catalog and the Reports and Analytics pane, they are categorized with the Report type.

One main way to view and perform other actions on Oracle BI Publisher reports is to use the Reports and Analytics pane. Depending on the action, the report might open in Oracle Business Intelligence Enterprise Edition. This application
Oracle Business Intelligence Publisher is described in the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher and the Oracle Fusion Applications Extensibility Guide for Business Analysts.

For lists of predefined reports, see assets with the Report type in Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

**Viewing and Scheduling Reports**

- Some predefined Oracle Business Intelligence Publisher reports are enabled for online viewing. Refer to the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher.
  
  See: Viewing a Report
  See: Using the Report Viewer Options

- Some reports can be scheduled in Oracle Business Intelligence Enterprise Edition. Refer to the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher.
  
  See: Creating Report Jobs
  See: Viewing and Managing Report Jobs
  See: Viewing and Managing Report History

- Many predefined Oracle BI Publisher reports are registered as scheduled processes and can only be submitted as processes in Oracle Fusion Applications. You can also view these submissions in the report history UI in Oracle BI Enterprise Edition.
  
**Creating and Editing Reports**

- If you have the appropriate roles, then you can create and edit reports and layouts. Use the Create button in the Reports and Analytics pane toolbar, or the Edit link for a specific report. Refer to the Oracle Fusion Applications Extensibility Guide for Business Analysts.

**Reports and Analytics Pane**

**Using and Creating Reports in the Reports and Analytics Pane: Highlights**

The Reports and Analytics pane provides a central place for you to quickly view or run any operational or analytical report relevant to your work. The pane is available in many work areas across Oracle Fusion Applications, and contains links to reports specific to the work area. You can also select **Navigator - Tools - Reports and Analytics** to go to the Reports and Analytics work area, which contains links to all reports that you have access to.
The Reports and Analytics pane contains a Shared Folders area and may also contain a My Folders area if you have saved any personal reports. Each area contains a hierarchy of folders that may contain items of three types:

- **Analysis**: Graph or table that displays specific sets of data
- **Dashboard**: One or more pages containing multiple analyses
- **Report**: Data in a predefined, printable format, often registered as a scheduled process so you can submit and monitor the report as you would any process

**Using Reports and Analytics**

- Open the folders and click the item that you want to use.
- Review videos, tutorials, and other help for using reports on the Oracle Cloud Learning Center and Oracle Fusion Applications Documentation Library.

  See: Oracle Sales Cloud Reports and Analytics
  See: HCM Reports and Analytics
  See: ERP Reports and Analytics

- See assets with the Report type in Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com) for lists of predefined reports and analytics.

**Creating Reports and Analytics**

- Click Create in the Reports and Analytics pane toolbar to create reports and analyses. Refer to the resources listed above for step by step instructions and demonstrations. You can also refer to the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition.
- Click Browse Catalog or the More link for a specific report or analysis to open a new window and use all the features of Oracle Business Intelligence (BI) Enterprise Edition.

**Saving Reports from the Reports and Analytics Pane: Points to Consider**

From the Reports and Analytics pane, you can create business intelligence (BI) analyses, dashboards, and reports if you have appropriate roles. For the Reports and Analytics pane, these BI objects are generically referred to as reports.

The availability of the new report in the Reports and Analytics pane depends on where you save it in the Oracle Business Intelligence Presentation Catalog and how administrators map the report to the pane.

**My Folders**

When you create a report, saving it in the My Folders area within the Oracle BI Presentation Catalog means that only you have access to it. If the report
was created in Oracle Business Intelligence Enterprise Edition, then the report is available in the Reports and Analytics work area, but not the Reports and Analytics pane in any other work area.

**Custom Folder**

If you have access to the Shared Folders area in the catalog and save the report in the Custom folder, then the report is available in the Reports and Analytics work area to anyone with access to the folder. Administrators with such access can then map the report to specific work areas for the report to be available in the Reports and Analytics pane.

**Note**

The actual access to the report in the Reports and Analytics pane depends on security. Even if a report is mapped and available in a work area, only users with permissions to access that work area and the report itself can see the report in the Reports and Analytics pane.
FAQs for Page Personalization

How can I retain minor personalizations after I sign out?

Whether minor personalizations, such as changing table layout and hiding regions, persist if you leave the page or sign out depends on the page that you are on. To ensure that all minor personalizations for the page are retained after you sign out, select **Personalization - Edit Current Page**, if available, and make your personalization changes.

To retain the layout of search results tables, you can run a search, change the layout of the results table, then create a saved search with the Save Results Layout check box selected. If you want the saved search criteria and results table layout to be set on the page every time you open the page, then also select the Set as Default check box.

What happens if I restore the page to the default content and layout?

When you select **Settings and Actions - Personalization - Reset to Default Content and Layout** in the global area, if available for the page that you are on, you remove all changes that were already made to the page by selecting **Edit Current Page** from the same menu. The reset affects objects at the page level, for example dashboard regions that you added or moved around, as well as dashboard layout changes. Personalization changes made within the components of a page, for example within a dashboard region, are not reset.

Preferences

Accessibility Preferences: Explained

Use the accessibility preferences to select accessibility modes for Oracle Fusion Applications. Access accessibility preferences from the global area by clicking the
**Accessibility** icon button or selecting Settings and Actions - Personalization - Set Preferences - Accessibility.

### Accessibility

The screen reader mode provides an alternate rendering of the user interface components that is enhanced for use by screen reader users and keyboard-only users.

### Color Contrast

The high contrast mode provides visual content that is compatible with operating systems or browsers that have high contrast features enabled. For example, the use of background images and background colors is optimized to prevent the loss of visual information while in high contrast mode. This mode does not provide much benefit if you are not also using your browser or operating system’s high contrast mode. Depending on your needs, you might also find it beneficial to use the large fonts mode with the high contrast mode.

### Font Size

The large font mode provides visual content that is compatible with browsers that are set to larger font sizes or have zoom capabilities. In the medium font mode, most text and many user interface containers have a fixed size to provide a consistent and well-defined look. In large font mode, text and containers have a scalable size. If you are not using larger fonts or browser zoom capabilities, then use the medium font mode. Depending on your needs, you might also find it beneficial to use the high contrast mode with the large font mode.

### Proxies: Explained

Proxies are people who have access to your account for a specified period of time. For example, you can designate someone to be your proxy to perform tasks for you while you are on vacation. Define your proxies in your Oracle Fusion Applications preferences. Similarly, if others designate you as their proxy, then you see a Switch to option, in the Settings and Actions menu of the global area, that allows you to work as other users.

**Important**

In your preferences, if the user you are selecting to be a proxy is already defined as your proxy, then you automatically overwrite the existing definition.

### Impersonation Sessions

An impersonation session starts when a proxy selects an account using the Switch To option and gains access to work as that user. At any point, proxies can switch to other accounts available to them, including switching back to themselves. When proxies sign out completely and sign back in, they are always signed in as themselves.
When your proxies switch to your account, they are essentially signed in using your account. For example, they have access to what you have access to. However, they have no access to preferences, yours or their own, during an impersonation session. Anything they do, for example create, edit, or delete records, is done as you, with your account. Next time you sign in, you can see the work that your proxies have done on your behalf. There would not be any issues if multiple people try to use the application with your account at the same time, for example if multiple proxies use your account in overlapping time periods, or if you sign in while proxies are impersonating you.

**Passwords**

You do not share your password with your proxies. When your proxies switch to your account, they are prompted to enter their own password to verify their identity so that only the proxies you define can impersonate you.

**Adding, Displaying, and Renaming Watchlist Items: Points to Consider**

Though the Watchlist comes with predefined categories and items, you can add or remove custom items to and from your own watchlist, determine which predefined and custom items are displayed or hidden, and rename your custom items.

**Adding or Removing Items**

To add a Watchlist item to your own watchlist, create an appropriate saved search on a search page with the Manage Watchlist button or menu item enabled. For example, if you want your watchlist to track corporate card transactions that arrived in the last week, then create a saved search for corporate card transactions with the appropriate search criteria. Use the button or menu item to open the Manage Watchlist dialog box, and select the saved search that you created.

You can include any saved search that you created on this search page as a Watchlist item, and it would be available to be displayed in your own watchlist only. All saved searches from the same search page appear in the Watchlist under one predefined Watchlist category.

To remove a Watchlist item based on a saved search, you can deselect it in the Manage Watchlist dialog box. If you delete the saved search itself, then immediately after doing so you should also deselect it from the Manage Watchlist dialog box. Otherwise, the deleted saved search will still appear in the dialog box, and the corresponding Watchlist item as well in your watchlist, until the next refresh of that Watchlist item. The refresh might be hours later, depending on setup.

**Displaying or Hiding Items**

Your Watchlist preferences contain all the predefined categories and items available to you, as well as any saved searches that you selected to use in the Watchlist. From this list, you can specify which categories and items to display in your own watchlist. To access your Watchlist preferences, go to the global area and then Settings and Actions - Set Preferences - Watchlist.
From the subset you selected to display, you can also choose to hide items that have no results found. Whenever the Watchlist refreshes, if there are no records that meet the criteria of the Watchlist item, then that item is not displayed in your watchlist.

**Renaming Items**

You cannot rename predefined Watchlist items or items based on your saved searches. You can ask your administrator to edit predefined Watchlist item names, but the changes will apply to all users.

For Watchlist items based on your saved searches, the saved search name is displayed as the Watchlist item name. You can rename the saved search using the Personalize Saved Searches dialog box from the corresponding search page. The Watchlist item name is then automatically updated the next time that the Watchlist is refreshed.

### Applications Core Activity Stream: Examples

Use the activity stream preferences to select Applications Core (Oracle Fusion Middleware Extensions for Applications) activities to follow in your activity stream. You can see what other administrators are doing with respect to the Applications Core features that you select. Select to follow activities related only to the features that you have access to. For example, do not select data security if you do not have access to the data security pages yourself.

All Applications Core activities are tracked only in the Activity Stream region on the Welcome dashboard of Oracle Fusion Applications. The following scenarios provide examples of the types of activities you can track for each available Applications Core feature, but do not represent a comprehensive list of all possible activity types to be tracked.

**Page Customizations**

Another administrator has added a region to the Welcome dashboard of Oracle Fusion Applications for all users. This information is displayed in the Activity Stream region, and you can see the name of the administrator who made the customization, the page where the customization was made, and the organization that the customization applies to. You can also navigate to the customized page.

**Data Security**

Another administrator has granted the manager role access to instance set 123 of the employee database resource. This information is displayed in the Activity Stream region, and you can see the name of the administrator who granted the access, as well as the names or IDs of the role, instance set, and database resource.

**Sandboxes**

Another administrator has published a sandbox named Financials Sandbox. This information is displayed in the Activity Stream region, and you can see the name
of the administrator who published the sandbox and the name of the sandbox. You can also click the sandbox name to see details about that sandbox.

Likewise, if another administrator makes a change within the context of a sandbox, for example customizing a page, then that information is also tracked in the activity stream. You can select specific sandboxes to follow by accessing the sandbox details from the Manage Sandboxes dialog box.

**Flexfields**

Another administrator has deployed a flexfield named Account. This information is displayed in the Activity Stream region, and you can see the name of the administrator who deployed the flexfield and the name of the flexfield.

**Trees**

Another administrator has created a new version of a tree code named Ledger, for the tree named Financials Hierarchy. This information is displayed in the Activity Stream region, and you can see the name of the administrator who created the version, as well as the names of the tree code and tree.

**FAQs for Preferences**

**Why did my general preferences settings automatically change?**

Some general preferences are integrated with a user directory that is also accessed outside of Oracle Fusion Applications. It is possible that you or an administrator changed a setting elsewhere, and the new value is reflected in your preferences. If you now change the setting in your preferences, then that becomes the latest value and would be reflected wherever the user directory is integrated. The impacted preferences are: Application Language, Territory, Date Format, Time Format, Currency, and Time Zone.

**What’s the display name language preference?**

The display name language preference determines which language all person names are displayed in, including your own name in the global area. Even if you only have one language installed, for example American English, there are pages in Oracle Fusion Applications that allow you to enter person names for different languages, for example Alexander for American English and Alejandro for Spanish.

If you set the display name language to Spanish, for example, and no value exists for Spanish, then the default display name in the LDAP is displayed. If you do not set the display name preference, then all user names will be displayed based on the language selected for the default language preference.

**Why can’t I find a specific person to set as my proxy?**

The person you want to set as your proxy must have a role with the appropriate privilege, FND_IMPERSONATE_USER_PRIV.
Why are some items not displayed in my watchlist?

Your Watchlist preferences determine what actually appears in your watchlist. You may have set your preferences to hide specific items or all items with no results found. If all items within a category are hidden due to what you set in preferences, then the category would also be hidden. To review your preferences, go to the global area and then Settings and Actions - Set Preferences - Watchlist.

When you select a saved search to be included as a Watchlist item in the Manage Watchlist dialog box, you determine that the item is available for the Watchlist, not that it is necessarily displayed. So even though your saved search is included in the Watchlist, it could be hidden due to your Watchlist preferences.

It is also possible that:

- You deselected saved searches in the Manage Watchlist dialog box, or deleted the saved searches.
- Your administrator has disabled specific predefined Watchlist items or categories for all users.
- You administrator has disabled using saved searches from specific search pages as Watchlist items.
- You no longer have access to tasks or pages that were previously available to you.

In these cases, you can no longer see the corresponding Watchlist items in your watchlist or in your Watchlist preferences.
Searching for Help: Points to Consider

Although the search in Oracle Fusion Applications Help works like other searches in Oracle Fusion Applications, there are help-specific aspects to consider.

Filters

The Search pane in Oracle Fusion Applications Help lets you define the scope of a help search and further filter search results. You can browse one of the Search navigators, such as Product, by expanding the nodes to see the lower levels. Select node check boxes to search across multiple nodes of the hierarchy. Alternatively you can click a specific node link to search in that node only. Each node in the navigator shows the number of help files available.

If you enter a search term, the Search pane is automatically updated to indicate the navigator nodes that the search results are found in. You can then use the links in the navigators to see only the search results for a specific node. You can also use the breadcrumbs above the search results to narrow the scope of the search results.

After you run a search, additional options are available in the Search pane for you to further filter search results, for example for specific help types, or for custom help, if any. You can perform additional searches using any of the options now available in the Search pane, including the navigators. Click the Reset All link to clear all selections and start with just the navigators in the Search pane.

Accessing Help from Help Windows

If you access help from a help window in the application, then the Search tab shows results for the business process activity relevant to the page or section where you opened the help window. Searches that you run at this point are limited to help related to that activity. To expand or change the scope of the search, use the breadcrumbs above the search results, the Business Processes navigator, or other options in the Search pane.
If you access help from a help window for a task list or task in the Setup and Maintenance work area, then the Search tab includes all help for all offerings. To narrow the scope, select a specific offering in the Functional Setup navigator in the Search pane.

**Note**

The search results for glossary terms are never filtered in any way.

**Browsing UPK Demos**

You can browse a list of all Oracle User Productivity Kit (UPK) demos that are predefined in Oracle Fusion Applications Help. Open the text version of any predefined demo, and click the **Table of Contents** link at the end of the text file to see the list.

**Help Types: Explained**

Oracle Fusion Applications Help contains various types of help content, including demos, examples, FAQs, glossary terms, help topics, and PDF guides. A business process or product can be supported by some or all of these help types.

**Demo**

Demos are Oracle User Productivity Kit (UPK) topics that visually demonstrate how to use the application to complete a short task or portion of a task. Demos can also provide an introduction to complex dashboards and work areas.

**Example**

Examples provide real use cases of features to illustrate how and when to use the feature, or scenarios to illustrate abstract concepts. Worked examples show exactly what you need to do to achieve a specific result, emphasizing decisions that you make and values that you enter.

**FAQ**

FAQs, or frequently asked questions, provide brief answers to questions that you might have regarding a task or page. For example, they can briefly explain what a term means, why something happened, how you can perform an action, or what happens if you perform the action.

**Glossary**

Glossary terms provide definitions for words or phrases used in help. You can search or browse glossary terms in the Glossary tab of Oracle Fusion
Applications Help. Where the links are available, you can also see the definition when you hover over the term in help content for other help types.

**Help Topic**

Help topics explain key concepts, illustrate how application components work together, or assist in decision-making by explaining points to consider or the options you have. Help topics can also provide reference, overview, and other information.

**PDF Guide**

PDF guides in Oracle Fusion Applications Help provide, in a book format, information usually not found in other help types. There are other guides that present a collection of help content from the other help types, except demos, in an organized and logical format. These guides, for example, address specific business processes and setup offerings. You can find these guides by going to Navigator - Documentation Library in Oracle Fusion Applications Help.

**FAQs for Help**

**How can I find help for my country and language?**

Use the Search pane in Oracle Fusion Applications Help to specify the language or country you want help for. The language and country options are available after a search is run, so that you can filter the results as needed.

When you access help from an application page, the country and language in your Oracle Fusion Applications preferences determine the help that you see by default. You see generic help plus help specific to your country, and help in English plus any help translated into your language. However, some application pages or sections are country specific and predefined with a country value that overrides your preferences, so that you see the appropriate help.

**Can people outside my enterprise see my help ratings, discussion forum posts, and tags?**

No. Ratings, discussions (if available), and tags on help are internal to your enterprise.

Oracle Technology Network forums are always open to anyone on the Internet.

**How can I access guides that are not in Oracle Fusion Applications Help?**

In Oracle Fusion Applications Help, go to Navigator - Documentation Library.
Troubleshooting Process: Examples

When you encounter an issue, you can try to diagnose it yourself and follow up with your help desk as needed. You can also take preventive measures and identify potential issues before running into real problems. Use these scenarios to understand how you can proceed and how the troubleshooting process might go.

Note

You can run diagnostic tests only if you have roles that let you do so.

Diagnostics Tests - Health Check

This example shows running a diagnostic test to verify that data is correct before starting a large-volume task.

1. You are a general ledger manager, and you periodically run relevant diagnostic tests to check on data, setup, and configurations, especially before closing the period.

2. You go to the Diagnostic dashboard and run the General Ledger Misclassified Accounts Validations test, to make sure that all accounts are correctly classified.

3. You review the test results and confirm that the accounts are ready for the period close process.

Diagnostics Tests - Troubleshooting

This example shows running a diagnostic test to start the troubleshooting process.

1. You are a general ledger manager, and you run into issues with the period close process.

2. You go to the Diagnostic dashboard and search for diagnostic tests using tags, with Financial Control and Reporting as the tag name.

3. You browse the search results for tests with Close Ledgers as the tag value.

4. You find and run the appropriate test, General Ledger Closing Validations.
5. The diagnostic test results show issues that you cannot fix yourself, which are validation errors in setup, configuration, or data integrity, in this case incomplete accounting setup.

6. You notify your help desk regarding the diagnostic test validation failures and describe your issue.

Note
If the test results had shown issues that you cannot fix yourself, but did not have validation errors, then you would ask your help desk to create an incident, and the help desk would take over in the troubleshooting process.

7. Your help desk performs a fix and asks you to rerun the test.

8. You repeat steps 4 through 7 until the test completes with no issues identified.

Diagnostic Tests - Data Analysis

This example shows running a diagnostic test to collect data for analysis.

1. You are a purchasing buyer, and you notice unexpected data in a specific purchasing document.

2. You search in Oracle Fusion Applications Help for information related to purchasing documents, to see if there is any help regarding relevant troubleshooting. You also find a list of predefined diagnostic tests, and check if there is a relevant diagnostic test.

3. You go to the Diagnostic dashboard and run the appropriate test, Manage Purchasing Documents Lifecycle - Validate.

4. You review the test results, which provide all the details about the particular purchasing document.

5. You identify the reason for the unexpected data and resolve the issue yourself.

Incidents and Troubleshooting Options

This example shows a process involving an incident and troubleshooting options.

1. You encounter a system error message that mentions an incident, for example, An application error has occurred. Your help desk can use the following information to obtain a more detailed description of this incident, followed by incident identification information.

2. The help desk is notified regarding this incident. You capture the details in the error message, including the incident number, to use if you need to contact the help desk.

3. The help desk evaluates your incident.

4. Your help desk decides that more diagnostic information is needed and grants you temporary access to the Troubleshooting Options menu item.

5. The help desk asks you to set troubleshooting options with specific settings, including the Severity Level field, and then to reproduce the problem.
6. You save the options, and sign out and sign back in so that the severity level for logging takes effect. You reproduce the problem, and additional diagnostic information is captured.

7. The help desk asks you to return all troubleshooting options to the original setting, revokes your access to the options, and analyzes the captured diagnostics.

8. Your help desk is unsure how to resolve the problem and checks for a solution in the My Oracle Support knowledge base.

9. The help desk finds something that might work and tries it out. Only if necessary, the help desk would send the incident to Oracle Support for help in resolving the issue.

**Diagnostic Tests: Highlights**

Diagnostic tests are used in the troubleshooting process to identify and resolve issues. Diagnostic tests are available from the Diagnostic dashboard, which you access from the global area by selecting **Settings and Actions - Troubleshooting - Run Diagnostic Tests**. If you do not see this menu item, then your help desk can make it available to you.

Using and managing diagnostic tests in general are described fully in the Oracle Fusion Applications Administrator's Guide. As you read content from that guide, you can ignore discussions about the command line interface because selecting **Run Diagnostic Tests** does not take you there.

**Note**

To get a list of predefined diagnostic tests, as well as some information about each test, see assets with the Diagnostic Test type in Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

**Finding and Running Diagnostic Tests**

- All predefined diagnostic tests are assigned a tag name and value. The predefined tags are based on business process modeling levels; the tag name is the business process area (L1), and the tag value is the activity (L3). For example, if you are a general ledger manager looking for diagnostic tests related to closing periods, you can search using Financial Control and Reporting as the tag name. In the search results, you would look under the hierarchy level with Close Ledgers as the tag value.

- Your roles determine what actions you can take, for example, whether you can view or also run diagnostic tests.

  See: Using Diagnostic Dashboard to Run Diagnostic Tests

**Reviewing Diagnostic Tests**

After you submit a diagnostic test run, you can perform other tasks for your own submissions. Your roles determine if you can perform any of these tasks on diagnostic tests that others submitted.
• Check the status of the diagnostic test run itself, or see if individual
diagnostic tests have detected problems.
   See: Using the Diagnostic Dashboard Application to Check the Status of a
   Diagnostic Test
• Cancel a test that is currently running.
   See: Canceling Diagnostic Test Runs
• Review diagnostic test results.
   See: Using the Diagnostic Dashboard Application to View the Results of
   Diagnostic Tests
• If you have the roles that allow you to do so, optionally add the test
   result information to an existing incident.

Common Diagnostic Tests

Application User Session Run Time Diagnostic Test

Use the Application User Session Run Time diagnostic test to analyze the
application user session run-time data of any Oracle Fusion application.

Run this test from the Diagnostic dashboard.

Parameters

Application User Session Cookie
Enter the cookie to identify the user session that you want to analyze. To obtain
the session cookie value:

1. Run the Application User Session Configuration diagnostic test to make
   sure that the ApplSession configuration values for your Oracle Fusion
   application are correct.
2. Use a valid user name and password to sign in to your Oracle Fusion
   application.
3. Display the list of cookies in your browser, according to instructions for
   the browser.
4. In the cookies listed for your domain site, select the cookie named
   ORA_FND_SESSION_<DATABASE_SID>. Your domain site is
   the host in the URL, for example oracle.com in the URL http://
   example.us.oracle.com, and <DATABASE_SID> is your database session
   ID.
5. Inspect the Content field, which has the format
   pillar_name:session_cookie_value:timestamp. The value that you
   need to enter for the Application User Session Cookie parameter is the
   session_cookie_value part, which appears between two colons.

If you cannot locate the cookie in step 4, then no application user session has
been created for your application.
FAQs for Troubleshooting

What's an incident?

An incident is a collection of diagnostic information related to a critical application error. This information shows the state of the application at the time the problem occurred. Incidents are automatically forwarded to your help desk. If you encounter an error message for an issue severe enough to prevent you from continuing in your work, then an incident is automatically created. Any diagnostic tests associated with the error message would also run automatically, with the results added to the incident. Your help desk can also manually create incidents.

What are troubleshooting options?

Troubleshooting options control what and how diagnostic information is captured in log or trace files while you reproduce a problem that you previously encountered. Your help desk can use this information to troubleshoot your issue. If you are asked to set these options, then your help desk would tell you the exact settings to use and when to reproduce the issue. Depending on the settings you use, or if you enable all the options, you can expect an impact on performance when you use the application.

Access troubleshooting options from the global area by selecting Settings and Actions - Troubleshooting - Troubleshooting Options. If you do not see this menu item, then your help desk can make it available to you.
Accessibility Features: Explained

Accessibility features in Oracle Fusion Applications support the use of assistive technology products, such as screen readers, and facilitate in performing functions using the keyboard instead of the mouse. For information on general accessibility features that are also available in Oracle Fusion Applications, see http://www.oracle.com/us/corporate/accessibility/assistive-tech-oracle-html-wp-163157.pdf. The following definitions provide more details, some of which are specific to Oracle Fusion Applications.

Skip Navigation Links

In Oracle Fusion Applications, each page has a Skip to content link, which takes you to the main content on the page. The link goes to the first area after the global area, which is usually the regional area if available, or otherwise the local area.

Additional Role and State Labels

Labels of various user interface components, for example menus and regional or local area panes, include role and state labels when you use Oracle Fusion Applications in the screen reader mode. These labels provide information on the purpose and current state of the item. In several cases, the Web Accessibility Initiative - Accessible Rich Internet Applications (WAI-ARIA) standards are leveraged for this role and state information.

In addition, required user interface elements, for example fields or text boxes, are labeled with the state text of required in the screen reader mode.

Isolated Display

When a popup, menu, or dialog box is opened in screen reader mode, display is solely isolated on the open component until you close it. In screen reader mode, user interface elements that are in error, for example with invalid data entry, are identified and shown in an isolated popup.

Content Change Announcements

In the screen reader mode, a WAI-ARIA live region is used to announce pertinent changes in the application, for example the rendering of partial...
content, progression of progress indicators, or changes in menu and dialog box state when you open or close them.

**Alternatives to Drag and Drop**

Pages that have drag and drop operations also have alternate methods of operation.

**Accessibility Preferences: Explained**

Use the accessibility preferences to select accessibility modes for Oracle Fusion Applications. Access accessibility preferences from the global area by clicking the **Accessibility** icon button or selecting **Settings and Actions - Personalization - Set Preferences - Accessibility**.

**Accessibility**

The screen reader mode provides an alternate rendering of the user interface components that is enhanced for use by screen reader users and keyboard-only users.

**Color Contrast**

The high contrast mode provides visual content that is compatible with operating systems or browsers that have high contrast features enabled. For example, the use of background images and background colors is optimized to prevent the loss of visual information while in high contrast mode. This mode does not provide much benefit if you are not also using your browser or operating system's high contrast mode. Depending on your needs, you might also find it beneficial to use the large fonts mode with the high contrast mode.

**Font Size**

The large font mode provides visual content that is compatible with browsers that are set to larger font sizes or have zoom capabilities. In the medium font mode, most text and many user interface containers have a fixed size to provide a consistent and well-defined look. In large font mode, text and containers have a scalable size. If you are not using larger fonts or browser zoom capabilities, then use the medium font mode. Depending on your needs, you might also find it beneficial to use the high contrast mode with the large font mode.

**Keyboard Shortcuts: Explained**

Keyboard shortcuts include access keys and accelerators that allow you to quickly perform common actions, such as saving or moving to the next set of records in a data table, using the keyboard. These shortcuts let you perform a function without having to manually move focus to the relevant user interface component.

An access key is a character assigned to a specific user interface component on a given page. For example, in English the **Save and Close** button is assigned the letter **S**, which is underlined in the button text. To jump to the assigned
component, press and hold at least one other key along with the designated access key. Your Web browser determines which other key or keys to press, and whether you just shift focus to the component or also immediately perform a function. All access keys work the same in both the default and screen reader mode.

An accelerator is a defined combination of keys that you can use to navigate or perform a function, no matter which browser you are using. Some keystrokes are specific to the default or screen reader mode. Accelerators in Oracle Fusion Applications are available for:
- Any page
- Simple user interface components
- Tables
- Trees
- Rich text editors
- Calendars

### Any Page

This table lists the keyboard shortcuts that you can use on any page, in either the default or screen reader mode.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus in page</td>
<td>• Tab</td>
<td>Move focus among the components on a page.</td>
</tr>
<tr>
<td></td>
<td>• Shift + Tab</td>
<td></td>
</tr>
<tr>
<td>Focus in component</td>
<td>Arrow keys</td>
<td>Navigate through items within a component, for example menu items within a menu.</td>
</tr>
<tr>
<td>Activate item</td>
<td>• Enter</td>
<td>Activate the item in focus, for example press the selected button or open a link.</td>
</tr>
<tr>
<td></td>
<td>• Space bar</td>
<td></td>
</tr>
</tbody>
</table>

### Simple Components

This table lists the keyboard shortcuts for various simple user interface components. The focus must be on the corresponding component or subcomponent for the accelerator to work, except where specified in the description.

**Note**

Each keyboard shortcut is available in both the default and screen reader mode except where specified otherwise.

<table>
<thead>
<tr>
<th>Component</th>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active data</td>
<td>Open active data dialog box</td>
<td>Ctrl + Alt + R</td>
<td>Used in screen reader mode only on pages with active data, for you to see information about data that is automatically updated on the page.</td>
</tr>
<tr>
<td>Choice list</td>
<td>Open</td>
<td>Alt + Arrow Down</td>
<td>Open a list of values, for example the list of date ranges in the Activity Stream region on the Welcome dashboard.</td>
</tr>
<tr>
<td><strong>Choice list</strong></td>
<td><strong>Select an item</strong></td>
<td><strong>Enter</strong></td>
<td><strong>Select the item in focus in a list of values.</strong></td>
</tr>
<tr>
<td>----------------</td>
<td>------------------</td>
<td>-----------</td>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td><strong>Choice list</strong></td>
<td><strong>Select all items</strong></td>
<td><strong>Ctrl + A</strong></td>
<td><strong>Select all items in a list of values, if multiple selection is allowed.</strong></td>
</tr>
<tr>
<td><strong>Choice list</strong></td>
<td><strong>Select items from top to current</strong></td>
<td><strong>Ctrl + Shift + Home</strong></td>
<td><strong>Select all items from the top of the list of values to the item in focus, if multiple selection is allowed.</strong></td>
</tr>
<tr>
<td><strong>Choice list</strong></td>
<td><strong>Select items from current to bottom</strong></td>
<td><strong>Ctrl + Shift + End</strong></td>
<td><strong>Select all items from the item in focus to the bottom of the list of values, if multiple selection is allowed.</strong></td>
</tr>
</tbody>
</table>
| **Context menu** | **Open** | **• Ctrl + Alt + M**  
**• Menu** | **Open a contextual menu where available, for example for a row in a table. The menu would contain actions you can perform on the selected row.** |
| **Dialog box** | **Toggle between dialog boxes** | **Ctrl + Alt + W** | **Toggle focus between open dialog boxes. Not applicable in screen reader mode because only one dialog box can be open at a time in that mode.** |
| **Disclosure icon** | **Open a closed section, pane, or region** | **• Enter**  
**• Arrow Down** | **Open a currently closed or hidden part of a component, for example a dashboard region or details section.** |
| **Disclosure icon** | **Close an open section, pane, or region** | **• Enter**  
**• Arrow Up** | **Close a currently open part of a component, for example a dashboard region or details section.** |
| **Menu** | **Toggle between detached menus** | **Ctrl + Shift + W** | **Toggle focus between open menus that are detached. Detachable menus are not available in screen reader mode.** |
| **Splitter** | **Focus on next splitter** | **Ctrl + Alt + P** | **Move focus to the next splitter, which is the divider between areas on a page, for example between the regional area and local area.** |
### Splitter
Move splitter | Arrow keys |
--- | --- |
Move the splitter in focus in the direction of the arrow key. For example, if you have the splitter between the regional and local area in focus, then use the left arrow key to move the divider to the left so that you give more space to the local area.

### Splitter
Open or close | Enter |
--- | --- |
Open or close an area that the splitter in focus is adjacent to. For example, use the splitter between the regional and local area to hide or display the regional area.

### Tab
Remove | Ctrl + Alt + F4 |
--- | --- |
Remove the tab in focus, only if removing tabs is allowed.

---

**Tables**
These keyboard shortcuts apply to both regular tables and tree tables, which present data in a hierarchical manner, except where specified otherwise.
This table lists the keyboard shortcuts for the entire table, in the default mode.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus on table</td>
<td>Tab</td>
<td>Access the table by keyboard, which takes you initially inside the first column header.</td>
</tr>
<tr>
<td>Filter</td>
<td>Enter</td>
<td>With focus on any of the table filter cells, run the filter according to current values. This function does not apply to tree tables.</td>
</tr>
<tr>
<td>Select all rows</td>
<td>Ctrl + A</td>
<td>With focus anywhere in the table, select all the rows in the table. This function is not available in all tables.</td>
</tr>
</tbody>
</table>

This table lists the keyboard shortcuts for column headers, in the default mode.

**Note**
Not all tables allow multiple column selection or any column selection.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move focus</td>
<td>Arrow Left, Arrow Right</td>
<td>Move focus from one column header to another. For tables with column groups, move focus from a parent column to the first child column. Subsequently use either key to move between the child columns, or on to the next column without a group.</td>
</tr>
<tr>
<td>Function</td>
<td>Keystroke</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Toggle between parent and child</td>
<td>Arrow Up, Arrow Down</td>
<td>Toggle between parent and child column headers in a column group.</td>
</tr>
<tr>
<td>Sort</td>
<td>Enter</td>
<td>With focus on the header for a sortable column, sort the table data by the column. Press the key again to do a reverse sort.</td>
</tr>
<tr>
<td>Move</td>
<td>Ctrl+Shift+Arrow Left, Ctrl +Shift +Arrow Right</td>
<td>With focus on a column header, move the corresponding column to the left or right.</td>
</tr>
<tr>
<td>Select</td>
<td>Space</td>
<td>With focus on a column header, select the corresponding column. Any previously selected columns are deselected.</td>
</tr>
<tr>
<td>Move focus and add to selection</td>
<td>Shift + Arrow Left, Shift + Arrow Right</td>
<td>With focus on a column header, move focus to previous or next column and add the column to the current selection.</td>
</tr>
<tr>
<td>Select range</td>
<td>Shift + Space bar</td>
<td>Select all columns from the previously selected column to the one with the column header currently in focus.</td>
</tr>
<tr>
<td>Add or remove from selection</td>
<td>Ctrl + Space bar</td>
<td>With focus on a column header, add or remove the corresponding column from the group of selected columns.</td>
</tr>
<tr>
<td>Deselect all</td>
<td>Esc</td>
<td>With focus on any column header, deselect all columns.</td>
</tr>
<tr>
<td>Move focus to data</td>
<td>Tab</td>
<td>With focus on any column header, move focus to the first available data cell that allows user input, for example a cell with a choice list or a link.</td>
</tr>
<tr>
<td>Open context menu</td>
<td>• Ctrl + Alt + M, • Menu</td>
<td>With focus on a column header, open the context menu for the corresponding column, where available.</td>
</tr>
</tbody>
</table>

This table lists the keyboard shortcuts for row headers, in the default mode. A row header is the cell preceding each row where you can click to select the row. Row headers might not have text or other content, and not all tables allow multiple row selection or any row selection.
<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select range</td>
<td>Shift + Space bar</td>
<td>Select all rows from the previously selected row to the one with the row header currently in focus.</td>
</tr>
<tr>
<td>Add or remove from selection</td>
<td>Ctrl + Space bar</td>
<td>With focus on a row header, add or remove the corresponding row from the group of selected rows.</td>
</tr>
<tr>
<td>Select all</td>
<td>Ctrl + A</td>
<td>With focus on any row header, select all rows. This function is not available in all tables.</td>
</tr>
<tr>
<td>Deselect all</td>
<td>Esc</td>
<td>With focus on any row header, deselect all rows.</td>
</tr>
<tr>
<td>Highlight</td>
<td>Arrow Right</td>
<td>With focus on a row header, highlight the corresponding row. Any previously selected rows are deselected. The row remains highlighted until you press the Arrow Left key. Most of the keyboard shortcuts for row headers do not work in the highlight mode.</td>
</tr>
<tr>
<td>Select highlighted row</td>
<td>Arrow Left</td>
<td>Select the currently highlighted row and exit the highlight mode. Any previously selected rows are deselected.</td>
</tr>
<tr>
<td>Edit</td>
<td>F2</td>
<td>With focus on a row header, enable the corresponding row for edit, where available. Press Esc to return focus to the row header and set the row to read-only.</td>
</tr>
</tbody>
</table>

This table lists the keyboard shortcuts for the data cells, in the default mode. Not all tables allow multiple row selection, any row selection, or edits.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scroll horizontally</td>
<td>Alt + Page Up, Alt + Page Down</td>
<td>With focus on any data cell, scroll to the right (Alt + Page Up) or left (Alt + Page Down).</td>
</tr>
<tr>
<td>Scroll by one row</td>
<td>Arrow Up, Arrow Down</td>
<td>With no rows selected, scroll the table up or down by one row.</td>
</tr>
<tr>
<td>Scroll by one page</td>
<td>Page Up, Page Down</td>
<td>With now rows selected, scroll the table up or down by one page. For example, if the table displays 10 rows at a time, then press Page Down to display rows 11 through 20.</td>
</tr>
<tr>
<td>Select multiple rows</td>
<td>Shift + Arrow Up, Shift + Arrow Down</td>
<td>With a row already selected, add the row above or below to the selection.</td>
</tr>
<tr>
<td>Select next or previous row</td>
<td>Arrow Up, Arrow Down</td>
<td>With a row already selected, move the selection to the previous or next row.</td>
</tr>
<tr>
<td>Function</td>
<td>Keyboard Shortcut</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Select row one page up or down</td>
<td>Page Up, Page Down</td>
<td>With a row already selected, move the selection to the row one page up or down. For example, if the table displays 10 rows at a time and row 2 is currently selected, then press Page Down to move the selection from row 2 to row 12.</td>
</tr>
<tr>
<td>Move focus to column header</td>
<td>Arrow Up</td>
<td>With the first row selected, move focus to the first column header.</td>
</tr>
<tr>
<td>Move focus to next or previous input cell</td>
<td>Tab, Shift + Tab</td>
<td>Move focus to the next (Tab) or previous (Shift + Tab) data cell that allows user input, for example a cell with a choice list or a link.</td>
</tr>
<tr>
<td>Move focus to input cell in next or previous row</td>
<td>Tab, Shift + Tab</td>
<td>With focus on the last input data cell in the row, move focus to the first input cell in the next row (Tab). With focus on the first input data cell in the row, move focus to the last input cell in the previous row (Shift + Tab)</td>
</tr>
<tr>
<td>Move focus to first input cell in next row</td>
<td>Enter</td>
<td>With focus on any input cell in the row, move focus to the first input cell in the next row.</td>
</tr>
<tr>
<td>Exit edit mode</td>
<td>Esc</td>
<td>With focus on any input cell in the row, return focus to the corresponding row header and set the row to read-only.</td>
</tr>
<tr>
<td>Open context menu</td>
<td>• Ctrl + Alt + M</td>
<td>With focus on a data cell, open the context menu for the corresponding row, where available.</td>
</tr>
<tr>
<td></td>
<td>• Menu</td>
<td></td>
</tr>
<tr>
<td>Open hierarchy selector</td>
<td>Ctrl + Alt + ^</td>
<td>With focus on the hierarchy icon that can appear next to the top node, open the hierarchy selector, which lets you navigate to levels above the top node. This function is available only for tree tables.</td>
</tr>
<tr>
<td>Expand or collapse</td>
<td>Arrow Left, Arrow Right</td>
<td>With focus on a disclosure icon for a parent node, expand (Arrow Right) or collapse (Arrow Left) the rows containing the child nodes. This function is available only for tree tables.</td>
</tr>
</tbody>
</table>

This table lists the keyboard shortcuts for tables, in the screen reader mode. Not all tables have the functionality described, for example row headers or column selection.
<table>
<thead>
<tr>
<th>Table Component</th>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter cell</td>
<td>Filter</td>
<td>Enter</td>
<td>With focus on any of the table filter cells, run the filter according to current values. This function does not apply to tree tables.</td>
</tr>
<tr>
<td>Column header</td>
<td>Select or deselect all rows</td>
<td>Space bar</td>
<td>With focus on the Select column header check box, select or deselect all rows. This check box is only available for tables that allow multiple row selection.</td>
</tr>
<tr>
<td>Column header</td>
<td>Select column</td>
<td>Space bar</td>
<td>With focus on a check box or option in a column header, select the corresponding column. Previously selected check boxes or options are deselected.</td>
</tr>
<tr>
<td>Column header</td>
<td>Move column</td>
<td>Ctrl + Shift + Arrow Left, Ctrl + Shift + Arrow Right</td>
<td>With focus on a column header, move the corresponding column to the left or right.</td>
</tr>
<tr>
<td>Column header</td>
<td>Resize column</td>
<td>Shift + Arrow Left, Shift + Arrow Right</td>
<td>With focus on a column header, decrease (Shift + Arrow Left) or increase (Shift + Arrow Right) the corresponding column by 25 pixels.</td>
</tr>
<tr>
<td>Column header</td>
<td>Sort data</td>
<td>Enter</td>
<td>With focus on the header for a sortable column, sort the table data by the column. Press the key again to do a reverse sort.</td>
</tr>
<tr>
<td>Column header</td>
<td>Open context menu</td>
<td>Ctrl + Alt + M</td>
<td>With focus on a column header, open the context menu for the corresponding column, where available.</td>
</tr>
<tr>
<td>Row header</td>
<td>Select row</td>
<td>Space bar</td>
<td>With focus on a check box or option in a row header, select the corresponding row. Previously selected check boxes or options are deselected.</td>
</tr>
<tr>
<td>Data cell</td>
<td>Open context menu for row</td>
<td>Ctrl + Alt + M</td>
<td>With focus on a data cell, open the context menu for the corresponding row, where available.</td>
</tr>
</tbody>
</table>
Trees display a hierarchical list of objects and provide controls to help you navigate through the hierarchy. Trees are not the same as tree tables, which are presented in table format with each item in the hierarchy as a row.

This table lists the keyboard shortcuts for trees in the default mode. Not all trees have multiple selection or any selection enabled.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand or collapse node</td>
<td>Arrow Left, Arrow Right</td>
<td>With focus on a disclosure icon for a parent node, expand (Arrow Right) or collapse (Arrow Left) the branch to display or hide the child nodes.</td>
</tr>
<tr>
<td>Move focus and selection</td>
<td>Arrow Up, Arrow Down</td>
<td>With focus on a node, move focus to the previous or next node. If selection is also enabled, then the new node is also selected.</td>
</tr>
<tr>
<td>Move focus</td>
<td>Ctrl + Arrow Up, Ctrl + Arrow Down</td>
<td>With focus on a node, move focus to the previous or next node, but do not change node selection.</td>
</tr>
<tr>
<td>Select or deselect nodes</td>
<td>Ctrl + Space bar</td>
<td>Toggle selection for the node in focus when navigating the tree using the Control and Arrow keys.</td>
</tr>
<tr>
<td>Select contiguous nodes</td>
<td>Shift + Arrow Up, Shift + Arrow Down</td>
<td>With focus on a node that is selected or not, add the previous or next node to the selection.</td>
</tr>
<tr>
<td>Select noncontiguous nodes</td>
<td>• Space bar</td>
<td>Add or remove noncontiguous nodes from the selection when navigating the tree using the Control and Arrow keys.</td>
</tr>
<tr>
<td></td>
<td>• Ctrl + Space bar</td>
<td></td>
</tr>
<tr>
<td>Select all nodes</td>
<td>Ctrl + A</td>
<td>With focus anywhere in the tree, select all nodes.</td>
</tr>
<tr>
<td>Open context menu</td>
<td>Ctrl + Alt + M</td>
<td>With focus on a node, open the context menu for the corresponding node, where available.</td>
</tr>
</tbody>
</table>
This table lists the keyboard shortcuts for trees in the screen reader mode. In this mode, a tree has an additional column of controls for node selection per row. The next column in the tree contains the tree nodes themselves.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand or collapse node</td>
<td>Enter</td>
<td>With focus on a disclosure icon for a parent node, expand or collapse the branch to display or hide the child nodes.</td>
</tr>
<tr>
<td>Select node</td>
<td>Space bar</td>
<td>Tab to the check box or option for selection and press Space bar to select the corresponding node.</td>
</tr>
<tr>
<td>Select all nodes</td>
<td>Space</td>
<td>Tab to the check box in the Select column header and press Space bar.</td>
</tr>
<tr>
<td>Open context menu</td>
<td>Ctrl + Alt + M</td>
<td>With focus on a node, open the context menu for the corresponding node, where available.</td>
</tr>
<tr>
<td>Open hierarchy selector</td>
<td>Ctrl + Alt + ^</td>
<td>With focus on the hierarchy icon that can appear next to the top node, open the hierarchy selector, which lets you navigate to levels above the top node.</td>
</tr>
</tbody>
</table>

**Rich Text Editors**

The functionality and keyboard shortcuts described here apply only to the standard rich text editor found throughout Oracle Fusion Applications. Some applications may use third-party rich text editors that work differently.

In the default mode, all toolbar controls appear on top of the editing area. In the screen reader mode, you can use the rich text editor only in source code mode, and none of the toolbar controls are displayed. There are no keyboard shortcuts in the screen reader mode.

This table lists the keyboard shortcuts for rich text editors in the default mode.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move focus</td>
<td>Tab</td>
<td>Move focus to the rich text editor itself, then enabled toolbar controls, then the editing area.</td>
</tr>
<tr>
<td>Rich text mode</td>
<td>Ctrl + Alt + R</td>
<td>Change the mode to enable editing of rich text.</td>
</tr>
<tr>
<td>Source code mode</td>
<td>Ctrl + Alt + C</td>
<td>Change the mode to enable editing of the source code.</td>
</tr>
<tr>
<td>Undo</td>
<td>Ctrl + Z</td>
<td>Undo the last operation.</td>
</tr>
<tr>
<td>Redo</td>
<td>Ctrl + Y</td>
<td>Redo the last undone operation.</td>
</tr>
<tr>
<td>Clear styles</td>
<td>Ctrl + Shift + S</td>
<td>Clear all the styles that were applied on the selected text.</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>Ctrl + B</td>
<td>Toggle boldface on the selected text.</td>
</tr>
<tr>
<td><strong>Italic</strong></td>
<td>Ctrl + I</td>
<td>Toggle italicizing the selected text.</td>
</tr>
<tr>
<td><strong>Underline</strong></td>
<td>Ctrl + U</td>
<td>Toggle underlining the selected text.</td>
</tr>
<tr>
<td><strong>Subscript</strong></td>
<td>Ctrl + Alt + -</td>
<td>Toggle subscript on the selected text.</td>
</tr>
<tr>
<td><strong>Superscript</strong></td>
<td>Ctrl + Alt + +</td>
<td>Toggle superscript on the selected text.</td>
</tr>
<tr>
<td><strong>Strikethrough</strong></td>
<td>Ctrl + 5</td>
<td>Toggle strikethrough on the selected text.</td>
</tr>
<tr>
<td><strong>Left alignment</strong></td>
<td>Ctrl + L</td>
<td>Left align the line with the cursor.</td>
</tr>
<tr>
<td><strong>Center alignment</strong></td>
<td>Ctrl + E</td>
<td>Center align the line with the cursor.</td>
</tr>
<tr>
<td><strong>Right alignment</strong></td>
<td>Ctrl + R</td>
<td>Right align the line with the cursor.</td>
</tr>
<tr>
<td><strong>Justify</strong></td>
<td>Ctrl + J</td>
<td>Fully justify the line with the cursor.</td>
</tr>
<tr>
<td><strong>Bulleted list</strong></td>
<td>Ctrl + Shift + L</td>
<td>Convert selected lines into a bulleted list.</td>
</tr>
<tr>
<td><strong>Numbered list</strong></td>
<td>Ctrl + Alt + L</td>
<td>Convert selected lines into a numbered list.</td>
</tr>
<tr>
<td><strong>Indent</strong></td>
<td>Ctrl + M</td>
<td>Increase the indentation of the line with the cursor.</td>
</tr>
<tr>
<td><strong>Outdent</strong></td>
<td>Ctrl + Shift + M</td>
<td>Decrease the indentation of the line with the cursor.</td>
</tr>
<tr>
<td><strong>Add Link</strong></td>
<td>Ctrl + H</td>
<td>Add a hyperlink to the selected text.</td>
</tr>
<tr>
<td><strong>Remove Link</strong></td>
<td>Ctrl + Shift + H</td>
<td>Remove the hyperlink from the selected text.</td>
</tr>
</tbody>
</table>

### Calendars

Calendars have various views: day, week, month, and list. Each scheduled event on the calendar is an activity.

This table lists the keyboard shortcuts for calendars in the default mode. In the list view, use the keyboard shortcuts for tables.

<table>
<thead>
<tr>
<th>Calendar View</th>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Navigate toolbar</td>
<td>Tab, Shift + Tab</td>
<td>With focus on a toolbar control, move focus to the control to the right (Tab) or left (Shift + Tab).</td>
</tr>
<tr>
<td>All</td>
<td>Open context menu</td>
<td>Ctrl + Alt + M</td>
<td>With focus on an activity or empty time slot, open the context menu for the corresponding item, where available.</td>
</tr>
<tr>
<td>Time Unit</td>
<td>Focus Action</td>
<td>Key Combinations</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>--------------</td>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Day</td>
<td>Move focus</td>
<td>• Arrow keys</td>
<td>With focus on an activity, move focus to another activity. Tab moves from left to right and top to bottom, and Shift + Tab goes the other direction.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tab, Shift + Tab</td>
<td></td>
</tr>
<tr>
<td>Week</td>
<td>Move focus on days</td>
<td>• Arrow Left, Arrow Right</td>
<td>With focus on a day of the week, move focus to the previous (Arrow Left, Shift + Tab) or next (Arrow Right, Tab) day.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tab, Shift + Tab</td>
<td></td>
</tr>
<tr>
<td>Week</td>
<td>Move focus to adjacent activity in previous or next day</td>
<td>Arrow Left, Arrow Right</td>
<td>With focus on an activity, move focus to the activity in the previous or next day that is the most similar in time slot. If no activities exist for the entire day, then move focus to the day of the week.</td>
</tr>
<tr>
<td>Week</td>
<td>Move focus between activities in a day</td>
<td>Arrow Up, Arrow Down</td>
<td>With focus on an activity, move focus to the next or previous activity in the day.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• If focus is on the first activity in a day, then Arrow Up moves focus to the day of the week.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• If focus is on a day of the week, then Arrow Down moves focus to the first activity within that day. Nothing happens if no activities exist for the entire day.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• If focus is on a day of the week, then Arrow Up does nothing.</td>
</tr>
<tr>
<td>Month</td>
<td>Move focus on dates</td>
<td>Tab, Shift + Tab</td>
<td>With focus on a date, move focus to the previous (Shift + Tab) or next (Tab) date. If focus is on the last day of the week, Tab moves focus to the first day of the following week.</td>
</tr>
</tbody>
</table>
This table lists the keyboard shortcuts for calendars in the screen reader mode, with the specified calendar component as the item in current focus. Only the list view is available in this mode.

<table>
<thead>
<tr>
<th>Calendar Component</th>
<th>Function</th>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Open context menu</td>
<td>Ctrl + Alt + M</td>
<td>With focus on an activity, open the context menu, where available.</td>
</tr>
<tr>
<td>Activity</td>
<td>Move focus to today</td>
<td>Arrow Left</td>
<td>With focus on any activity, move focus to today’s date.</td>
</tr>
</tbody>
</table>
| Activity | Move focus to previous or next activity | • Arrow Up, Arrow Down  
• Tab, Shift + Tab | With focus on an activity, Arrow Up or Down moves focus to the next or previous activity.  
• If focus is on the first activity in a day, then Arrow Up moves focus to the last activity in the previous day, and Arrow Left or Shift + Tab moves focus to the date.  
• If focus is not on the first activity of the day, then Tab can also be used to move focus to the next (Tab) or previous (Shift + Tab) activity.  
• If focus is on the last activity of the day, then Arrow Right or Tab moves focus to the next day’s date. |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Move focus to previous or next date</td>
<td>Arrow Up, Arrow Down</td>
</tr>
</tbody>
</table>
| Date | Move focus to first activity of current date | • Arrow Right  
• Tab | With focus on a date, move focus to the first activity of the current date. |
| Date | Move focus to last activity of previous date | • Arrow Left  
• Shift + Tab | With focus on a date, move focus to the last activity of the previous date. |
action
The kind of access named in a security policy, such as view or edit.

activity stream
A feature that tracks and displays actions and messages from people whom you are connected to in your social network, as well as activities from the application.

business object
A resource in an enterprise database, such as an invoice or purchase order.

database resource
An applications data object at the instance, instance set, or global level, which is secured by data security policies.

entitlement
Grants of access to functions and data. Oracle Fusion Middleware term for privilege.

flexfield
Grouping of extensible data fields called segments, where each segment is an attribute added to an entity for capturing additional information.

global area
The region across the top of the user interface. It provides access to features and tools that are relevant to any page you are on.

local area
The region in the middle of the work area, where you do most of your work.

offering
A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

Oracle Fusion Applications Search
A special type of search based on technology that differs from that of most other searches in Oracle Fusion Applications. Oracle Fusion Applications Search is available in the global area and other places.

privilege
A grant or entitlement of access to functions and data. A privilege is a single, real world action on a single business object.
**process**
A program that you schedule and run to process data and, if appropriate, generate output as a report. Also known as scheduled process.

**process set**
A process that consists of multiple individual processes or other process sets.

**Query By Example**
The fields directly above table column headers in which you can enter values for filtering the data in the table.

**regional area**
The collapsible region on the left side of the work area, containing controls that refresh, manipulate, or otherwise update the local area.

**role**
Controls access to application functions and data.

**sandbox**
A run time session that commits changes out of reach of mainline users.

**space**
A work area that supports people working in a group of any size, organized around an area of interest or a common goal.

**tree**
Information or data organized into a hierarchy with one or more root nodes connected to branches of nodes. A tree must have a structure where each node corresponds to data from one or more data sources.

**workflow**
An automated process in which tasks are passed from a user, a group of users, or the application to another for consideration or action. The tasks are routed in a logical sequence to achieve an end result.